



COORDINATED PUBLIC TRANSIT - HUMAN SERVICES TRANSPORTATION PLAN

MARCH 2019



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Introduction

This document is intended to serve as the Coordinated Public Transit – Human Services Transportation Plan (“Coordinated Plan”) for Marion and Polk counties. In general, this document will refer to Salem Area Mass Transit District (SAMTD) as Cherriots, but the two names refer to the same organization. The Coordinated Plan is a guiding document for the Cherriots Board of Directors, including its Special Transportation Fund Advisory Committee (STFAC) that makes recommendations about grant distributions funded by the State of Oregon’s Special Transportation Fund (STF) and Section 5310 (§5310) funds to improve transportation programs and services for seniors and people with disabilities. This document builds on the 2007 Specialized Transportation Plan for Marion and Polk counties and the subsequent 2009 and 2016 Coordinated Plans. The 2007 Specialized Transportation Plan examined the ways special needs transportation services are delivered in the two counties, and recommended improvements to better coordinate services. The 2009 Coordinated Plan updated the Specialized Transportation Plan to meet federal and state planning guidelines.

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

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

Looking forward

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

Decisions made today on how best to invest in transportation options for seniors and people with disabilities will affect the future quality of life for thousands of Marion and Polk county residents. By 2025, there is expected to be approximately

34,000 more people 65 years and older in the two-county area, growing from a 13.2 percent share of the population today to a 17.9 percent share. According to the 2010 US Census, more than 14 percent of the two-county population reported a disability.

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

The Cherriots 2019 Coordinated Plan update

The Oregon Department of Transportation (ODOT) serves as the designated recipient for Section 5310 funds. As the designated recipient of these funds, ODOT is required to conduct a competitive selection process to determine use of the funds, and to certify that projects were derived from a Coordinated Plan. These requirements come from a Federal Transit Administration (FTA) administrative rule. ODOT also administers Oregon's STF. An Oregon administrative rule requires that STF Agencies (the counties, transportation districts, and Native American tribes designated by state law to receive the STF monies) prepare a plan to guide the investment of STF monies to maximize the benefit to seniors and people with disabilities within their jurisdictions. ODOT has delegated authority to Cherriots as the governing body to determine how STF and 5310 dollars are spent in the rural and urban areas of Marion and Polk counties. This Coordinated Plan is used for the FTA-direct §5310 grant, the ODOT pass-through §5310 grant, and any STF grant funds; and to coordinate transportation services with human services organizations that receive funding from the Oregon Department of Human Services (DHS).

In addition to the Section 5310 funds received from ODOT, Cherriots is the designated, direct recipient of FTA Section 5310 funds because the Salem-Keizer urbanized area (UZA) population exceeds 200,000. The Cherriots 5310 Program Management Plan (PMP) describes the policies and procedures for administering an Enhanced Mobility of Seniors and People with Disabilities program. The PMP articulates a vision for Cherriots future with programs that focus on the maintenance of critical services, while strategically developing opportunities for the growth of services and facilities for the years to come. In this regard, the PMP aligns

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

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

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

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

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

Chapter 1: Background and methodology

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

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

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

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

The 2019 update was made to bring the document up to current external branding standards and to bring the document's update schedule in line with the Cheriots Section 5310 Program Management Plan update schedule, which must be updated every three to four years.

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

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

1.1 Overview of relevant grant programs

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

1.2 Section 5310 federal funds

On Aug. 10, 2005, President Bush signed into law the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users, commonly referred to as SAFETEA-LU. SAFETEA-LU authorized funding for federal surface transportation programs for six years through Fiscal Year 2009. Starting in Fiscal Year 2007, projects funded through three programs in SAFETEA-LU and administered by the Federal Transit Administration (FTA), including the Job Access and Reverse Commute Program (JARC, Section 5316), New Freedom (Section 5317), and the

Formula Program for Elderly Individuals and Individuals with Disabilities (Section 5310) are required to be derived from a locally developed, coordinated transportation plan. These three funding programs focus on the needs of transportation disadvantaged people or those with special transportation needs that cannot be met through traditional means (access to automobile or public transportation).

On July 6, 2012, President Obama signed into law the Moving Ahead for Progress in the 21st Century Act, referred to as MAP-21. This transportation bill merged the New Freedom program (49 U.S.C. 5317) into the Section 5310 program. As a result, activities that were eligible under the New Freedom program, including operating expenses, were eligible under Section 5310. Consistent with Section 5317, funds were apportioned among large urbanized areas, small urbanized areas, and rural areas instead of only to states. In addition, MAP-21 merged the Job Access and Reverse Commute (JARC) program with Section 5307 funds.

The current Federal Transportation Bill, also known as the Fixing America's Surface Transportation (FAST) Act, replaced MAP-21. Under the FAST Act, JARC activities are eligible under Section 5307.

Traditional Section 5310 project examples include:

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

Nontraditional Section 5310 project examples include:

- Travel training to help seniors and people with disabilities make transit trips on fixed-route transit service where they have more convenience in choosing when to travel and more independence
- Volunteer driver programs
- Building an accessible path to a bus stop, including curb-cuts, sidewalks, accessible pedestrian signals, or other accessible features
- Improving signage, or wayfinding technology

-
- Incremental costs of providing same day service or door-to-door service (compared to curb-to-curb with 24 hours notice)
 - Purchasing vehicles to support new accessible taxi, ride sharing and vanpooling programs
 - Mobility management programs

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

1.3 State Special Transportation Funds (STF)

The STF was created in 1985 by the Oregon Legislature. This is allocated by the Oregon Legislature every two years to 42 jurisdictions throughout the state including Cherriots. It is funded by cigarette tax revenue, excess revenue earned from sales of photo ID Cards, and other funds from the Oregon Department of Transportation. The STF Program provides a flexible, coordinated, reliable, and continuing source of revenue in support of transportation services for seniors and people with disabilities of any age. The Oregon Legislature intended that STF funds be used to provide transportation services needed to access health, education, work, social, and recreational opportunities so that seniors and people with disabilities may live as independently and productively as possible. The funds may be used for any purpose directly related to transportation services, including transit operations, capital equipment, planning, travel training, and other transit-related purposes.

1.4 Cherriots role as the Special Transportation Fund Agency

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

Cherriots is also the designated "STF Agency" to receive and distribute STF funds from the State of Oregon for Marion and Polk counties. Both sources of funds are focused on supporting transit service for seniors and people with disabilities. STF makes a further distinction that the funds can be used to support people with low income, many of whom are also seniors and people with disabilities. In addition,

Cherriots acts as the pass-through agency for \$5310 dollars distributed by ODOT to non-profit agencies in Marion and Polk counties.

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

1.5 Cherriots Board of Directors

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

1.6 Grant application solicitation, review, and approval process

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

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

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

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

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

Chapter 2: Demographic profile

This chapter provides an overview of Marion and Polk counties based on data from the 2010 United States Census and the 2010-2014 American Community Survey five-year estimate dataset. This chapter of the Coordinated Plan contains maps, created using Geographic Information System (GIS) technology, that illustrate the location and density of people aged 60 years and older, people with disabilities, and people with low income within Marion and Polk counties. These maps visually depict geographic areas with concentrations of the population groups that face particular mobility concerns, and who are the subject of this plan. Cherriots generally uses the 60 years and older data to determine eligibility for reduced fares and whether they can ride the Cherriots Shop and Ride, for example. Cherriots definition of a senior citizen for eligibility for reduced fares is 60 years and older, the federal definition is 65 years and over, specific to the 5310 grant program. Because the Coordinated Plan is used for both Oregon and federal grants, both age groups need to be documented. *Information on seniors 65 years and older is in **Appendix C.***

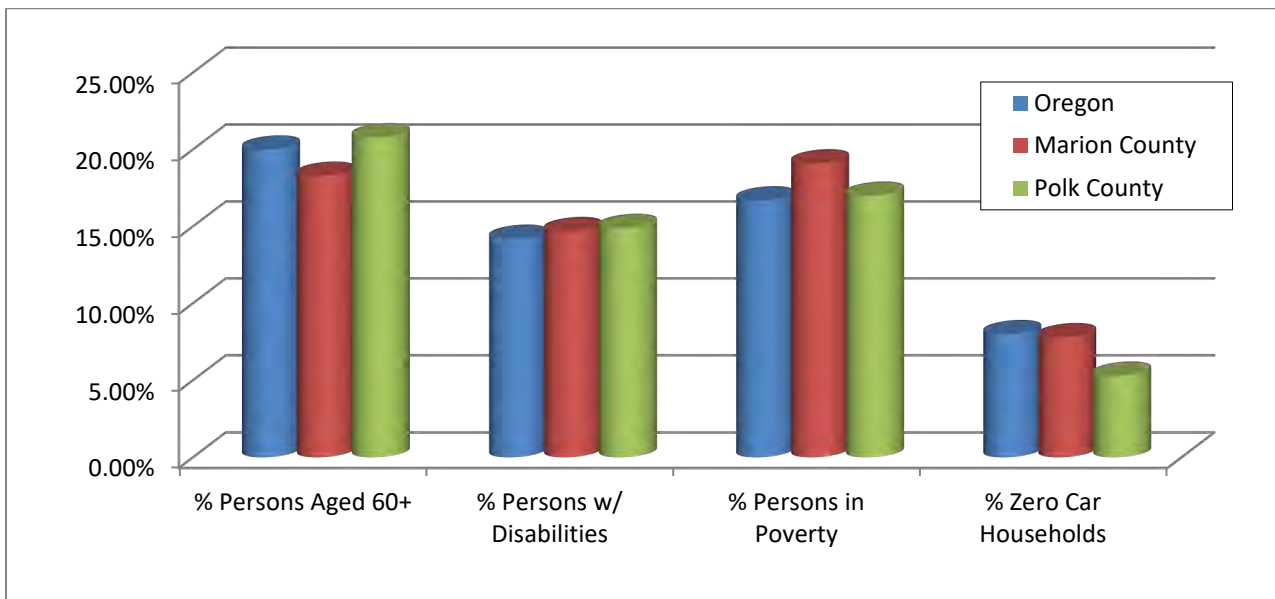
Table 1 (and **Figure 1** on the following page) provides a “snapshot” of three population groups of concern for the Coordinated Plan: older adults, people with disabilities, and people with low income (as defined by the federal definition).

Table 1. Population characteristics

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

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

Figure 1. Population characteristics



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

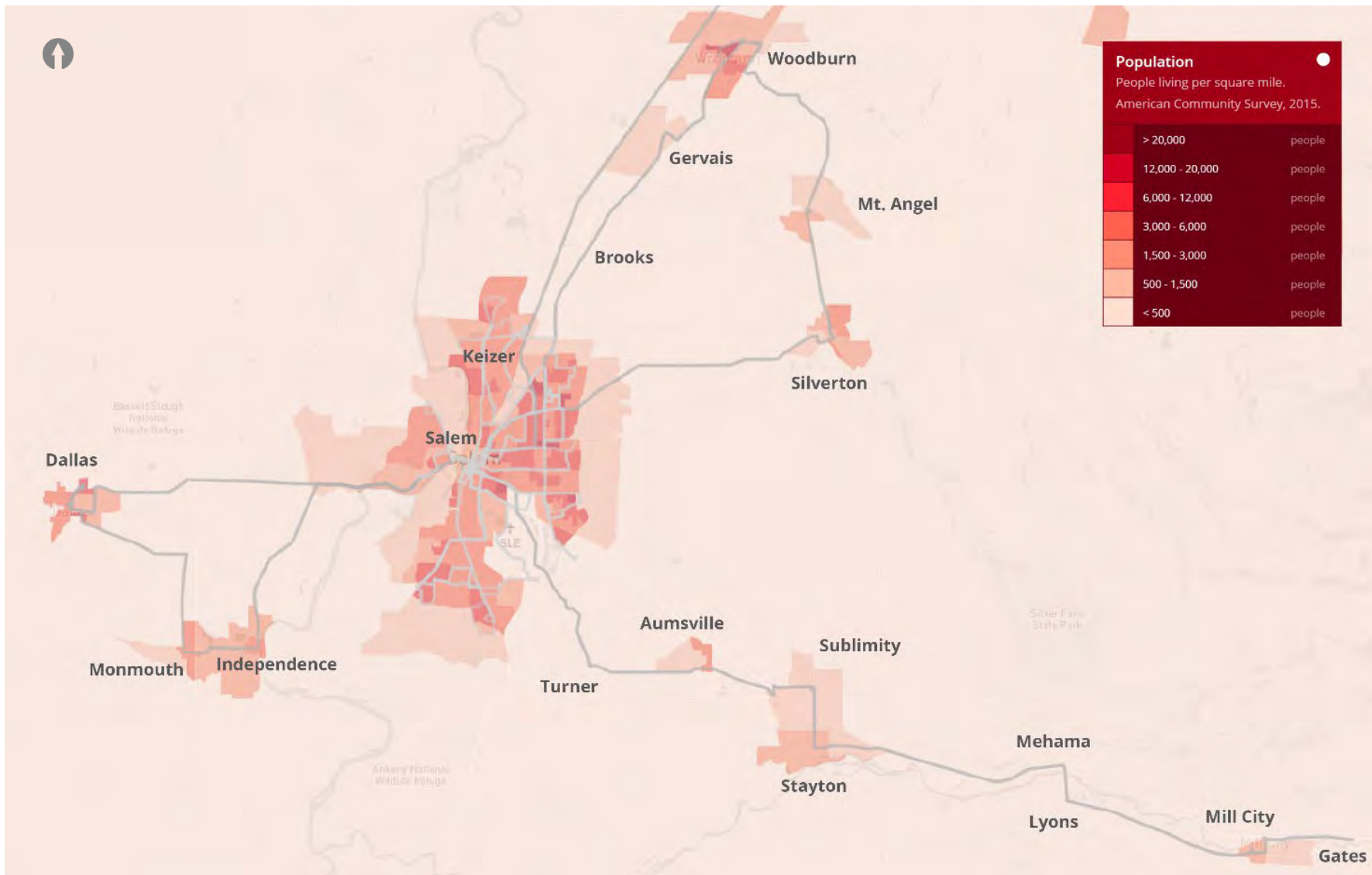
Table 2 presents an overview of the population of cities within Marion and Polk counties. The distribution of the total population in both counties is shown on a map in **Figure 2**.

Table 2. Population by city

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

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

Figure 2. Population density in Marion and Polk counties



Source: American Community Survey 2015 via Remix

2.1 Older adults

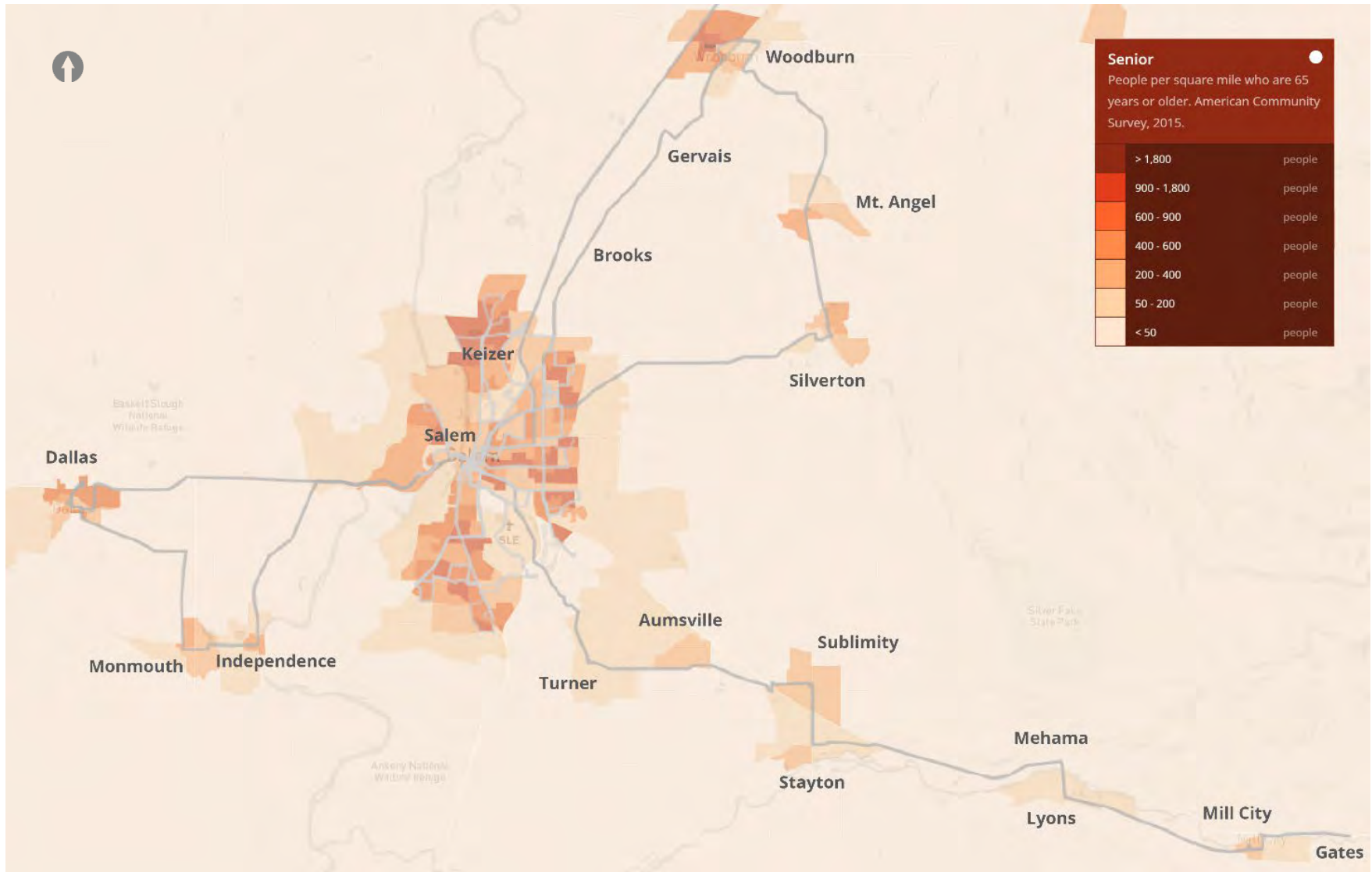
Figure 3 provides a population density map of people aged 60 and older in Marion and Polk counties. It shows that high concentrations of seniors are in the Salem-Keizer area, where the population is denser in general. Outside the Salem area, the largest concentrations of seniors are in Dallas and Woodburn.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

Table 3. Adults aged 60+ by city

City	2010 Population Age 60+ ¹	% Age 60+	City	2010 Population Age 60+ ¹	% Age 60+
Salem	26,480	17.2%	Turner	420	22.7%
Keizer	6,880	18.9%	Mill City ³	340	18.5%
Woodburn	4,730	19.6%	Willamina ³	320	15.7%
Dallas	3,650	25.0%	Hubbard	300	9.3%
Hayesville ²	3,090	15.5%	Falls City	220	23.2%
Four Corners ²	2,560	16.1%	Aurora	180	19.2%
Silverton	1,830	20.0%	Donald	150	15.6%
Stayton	1,400	18.3%	Gervais	150	6.0%
Monmouth	1,220	12.8%	Gates	140	30.6%
Independence	1,120	13.1%	St. Paul	70	17.2%
Sublimity	930	34.6%	Scotts Mills	60	17.3%
Mt. Angel	820	25.0%	Detroit	60	29.3%
Aumsville	440	12.2%	Idanha	30	24.5%
Jefferson	440	14.0%			

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

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



Source: American Community Survey 2015 via Remix

2.2 People with disabilities

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

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

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

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

¹ https://www.census.gov/people/disability/files/2008ACS_disability.pdf, page 3

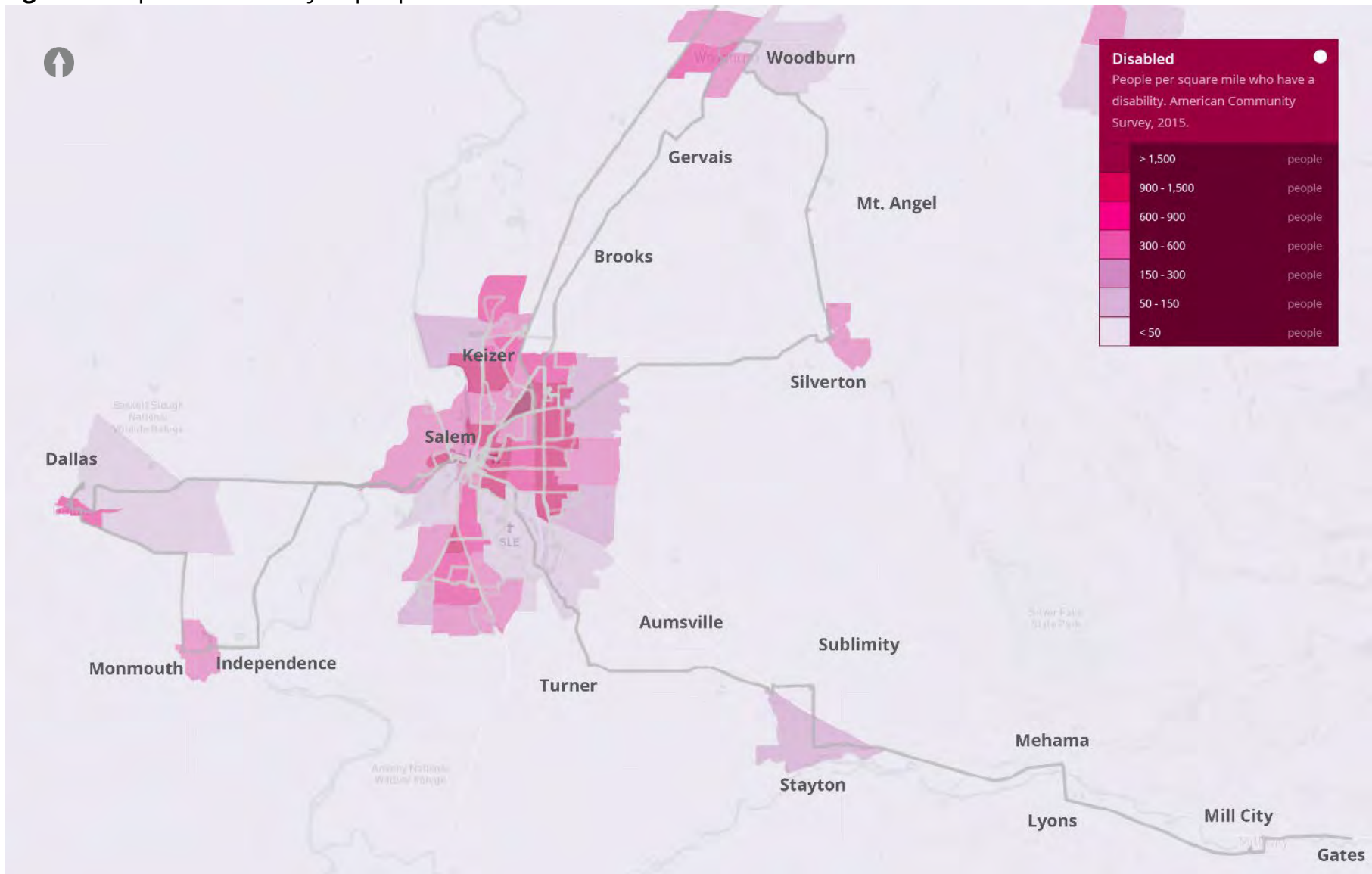
Figure 4 on the following page shows a map of population density of people with disabilities in Marion and Polk counties. **Table 4** lists the percentages of the population with a disability for communities in each county.

Table 4. People with disabilities by city

City	Population with Disabilities ¹	% People w/ Disabilities	City	Population with Disabilities ¹	% People w/ Disabilities
Salem	22,300	14.6%	Willamina³	430	24.5%
Keizer	5,650	15.4%	Turner	390	17.3%
Woodburn	3,070	12.8%	Hubbard	360	11.3%
Hayesville ²	2,840	15.3%	Mill City³	340	20.4%
Dallas	2,720	18.6%	Gervais	290	11.6%
Four Corners²	2,590	15.1%	Falls City	290	32.2%
Silverton	1,320	14.2%	Gates	150	25.2%
Stayton	1,200	15.6%	Donald	80	7.8%
Monmouth	1,100	11.3%	Aurora	70	7.1%
Independence	1,010	11.7%	Idanha	50	32.4%
Aumsville	730	19.7%	Scotts Mills	40	8.3%
Mount Angel	660	20.0%	Detroit	40	27.2%
Sublimity	540	20.6%	St. Paul	30	9.1%
Jefferson	540	17.0%			

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

Figure 4. Population density of people with disabilities



Source: American Community Survey 2015 via Remix

2.3 Income status

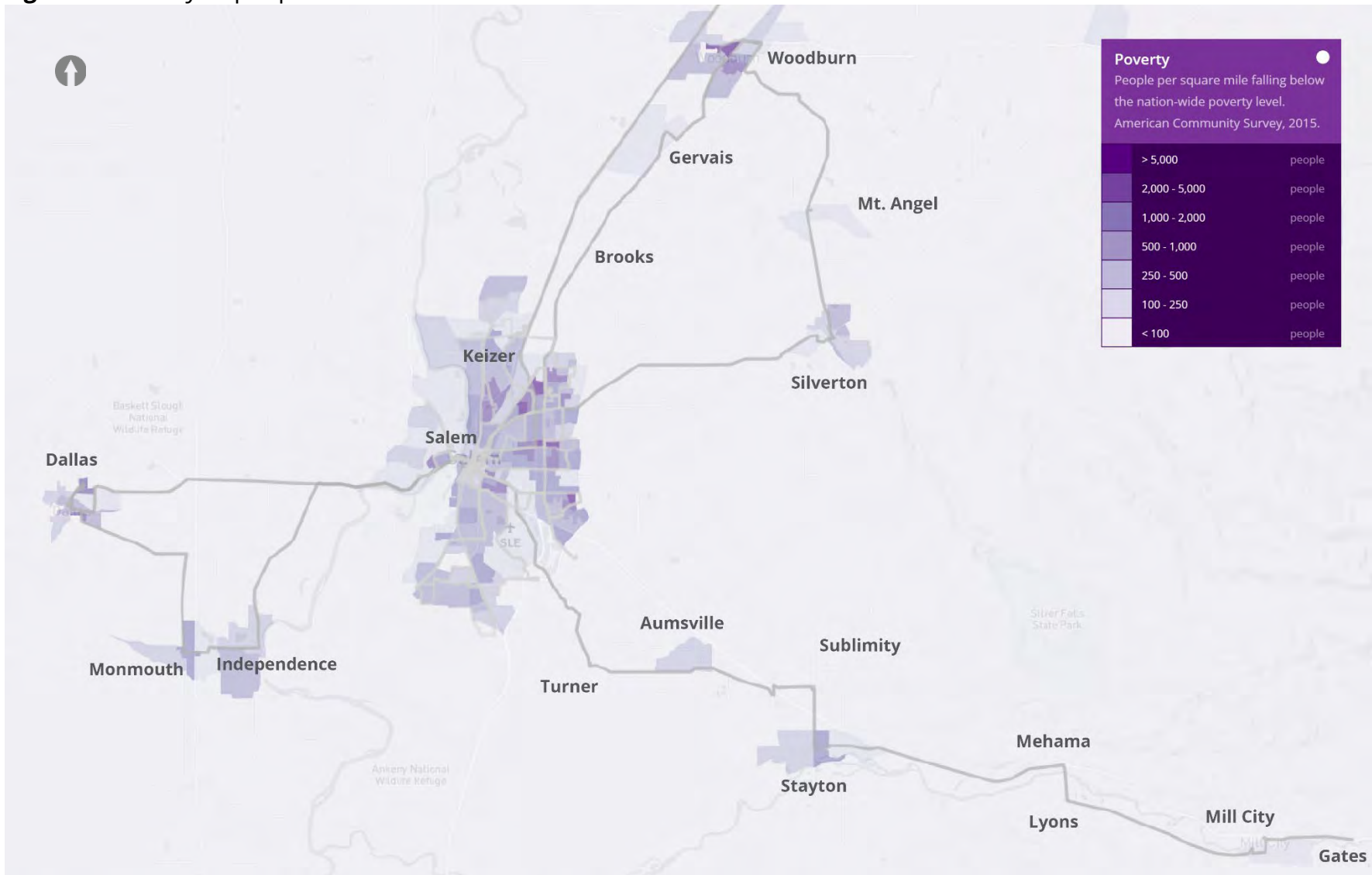
In Marion County, an average of 19.1 percent of residents (compared with a statewide average of 16.7 percent) live below the applicable federal poverty threshold, which for a family of four is defined as a household income under \$23,850. In Polk County, 17.0 percent of residents live below the poverty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

Table 5. People with low income by city

City ⁵	# People with Low Income ^{1,2}	% People with Low Income ^{1,2}	City ⁵	# Low-Income People ^{1,2}	% Low-Income People ^{1,2}
Salem	26,589	17.2%	Gervais	411	16.2%
Woodburn	6,472	26.3%	Mill City⁴	402	22.0%
Keizer	5,782	15.6%	Mt. Angel	386	11.6%
Hayesville ³	4,067	19.8%	Sublimity	299	10.8%
Four Corners ³	3,197	20.2%	Turner	273	12.1%
Monmouth	2,935	33.5%	Falls City	196	21.3%
Dallas	2,302	15.4%	Donald	102	8.8%
Independence	2,006	22.4%	Aurora	91	7.1%
Stayton	1,541	19.7%	Gates	58	13.0%
Silverton	1,107	11.6%	Scotts Mills	52	12.5%
Aumsville	687	17.7%	Idanha	31	18.8%
Jefferson	671	21.1%	St. Paul	22	5.7%
Hubbard	444	13.6%	Detroit	9	10.1%
Willamina⁴	434	22.9%			

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

Figure 5. Density of people with low income



Source: American Community Survey 2015 via Remix

2.4 Vehicle ownership

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

Table 6. Number of zero-vehicles households by city

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

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

2.5 Population trends

Between 2010 and 2025, the overall population growth in Marion County (21 percent) and Polk County (28 percent) is expected to outpace population growth for the state as a whole (18 percent). The data is shown in **Table 7**, from population estimates provided by the Oregon Department of Administrative Services' Office of Economic Analysis. Between 2010 and 2025, the rate of population increase for adults 65 years and older in Marion County (65 percent) and Polk County (68 percent) is expected to be slower than the state as a whole (73 percent).

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

Table 7. Population growth forecasts

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

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

2.6 Employment

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

Table 8 provides a “snapshot” of employment and median household income in Marion and Polk counties and a comparison with the state overall. Both counties have a labor force that is similar Oregon as a whole in terms of the percentage of the overall population that is eligible to participate in work. The unemployment rate (as a percentage of the overall labor force) is about one-half percentage point higher in the Salem Metropolitan Statistical Area than in the state of Oregon as a whole. The median household income in Marion County is approximately 6 percent lower than the statewide median, and in Polk County, the median household income is approximately 2.5 percent higher.

Table 8. Employment characteristics

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

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

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

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

2.7 Major employers

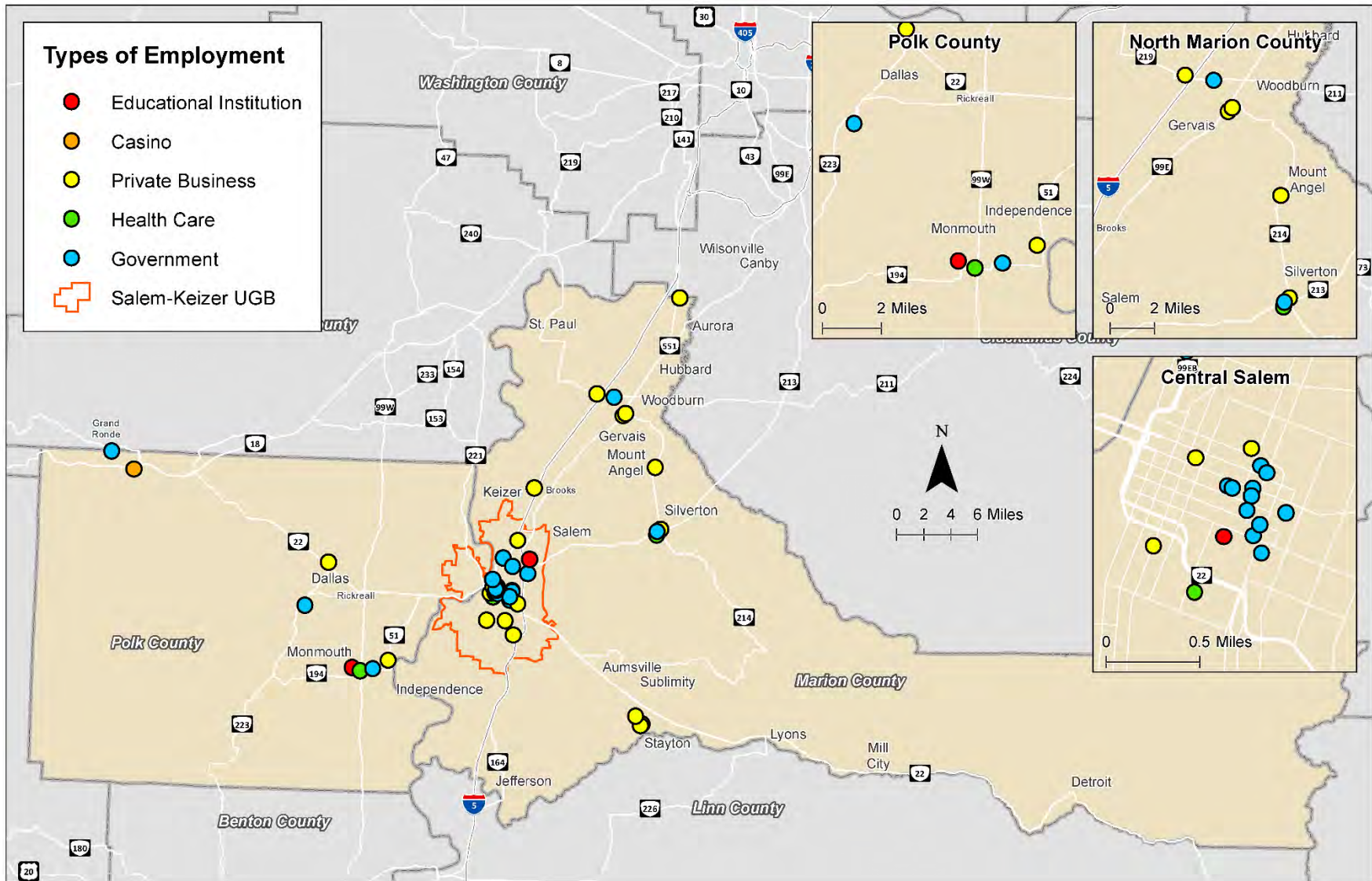
Identifying major employment locations in Marion and Polk counties serves two purposes. First, the location of large employers, especially government agencies, in central cities and along major transportation routes, help to define many of the common geographic destinations that seniors and people with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

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

Figure 6 shows the location of some of the largest employers (with at least 450 employees) by business type (government, educational institutions, health care, private business, and casino) in Marion and Polk counties. Some of the largest employers outside Salem include NORPAC Foods in Stayton, Spirit Mountain Casino in Grand Ronde, Western Oregon University in Monmouth, Legacy Silverton Medical

Center, the Woodburn School District, Mid Valley Health Care in Lebanon, Columbia Helicopters in Aurora, and BrucePac (meat packing company) in Silverton and Woodburn.

Figure 6. Major places of employment



Chapter 3: Overview of existing public transportation services

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

3.1 Salem Area Mass Transit District

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

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

-
- The Cherriots Trip Choice program is a one-stop-shop for transportation options information. Free services include ride-matching, emergency ride home and transit, cycling, walking and park and ride lot information. Assistance with developing employer and transit pass programs is also available.

3.2 Cherriots Local

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

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

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

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

Cherriots Local fares will be changing effective June 1, 2019. A new youth fare will be offered at that time for Cherriots Local and Regional riders (excluding Route 1X).

This is in response to a requirement of the Statewide Transportation Improvement Fund (STIF) grant program, which states that at least 1 percent of the funds be used toward improving transportation for students in grades 9 through 12. The new fares are displayed in **Table 9**. The Reduced fare is for seniors ages 60 and older, people with disabilities, and Medicare card holders. Youth fares are for children 6-18 years of age.

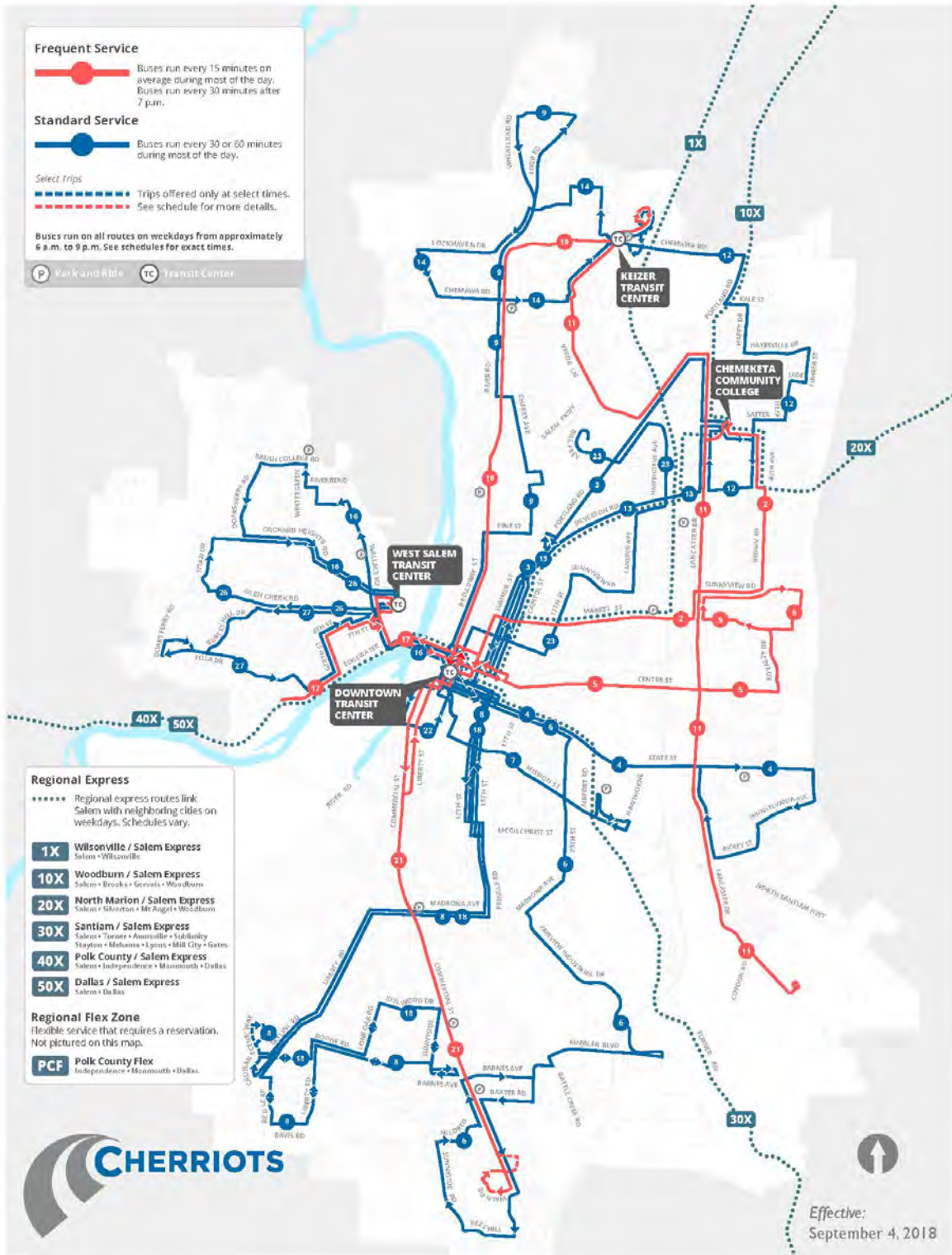
Table 9. Cherriots Local fares

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

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

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

Figure 7. Cherriots Local System Map



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

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

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

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

3.3 Cherriots Regional

Cherriots Regional provides transit service to the smaller cities and largely rural areas in Marion and Polk counties. The purpose is to provide people, many of whom are seniors, people with disabilities, or individuals who are economically disadvantaged, access to medical services, education, employment, shopping, and recreational opportunities,. Service is provided through commuter express fixed routes (1X, 10X, 20X, 30X, 40X, and 50X) and a flex route (Polk County Flex). In Fiscal Year 2018, Cherriots Regional provided approximately 131,600 annual rides.

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

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

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

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

Table 10 describes the Cherriots Regional fares as of January 2015. Cherriots Regional offers discounted fares at about two-thirds of the regular fare for youth, seniors, and people with disabilities. Monthly passes are also available to riders. Dial-a-ride fares on Cherriots Regional are equivalent to Cherriots Local fares. Tickets for Cherriots Regional services are sold at many locations throughout Marion and Polk counties, and some are provided by human services agencies to their clients.

Table 10. Cherriots Regional fares

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

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

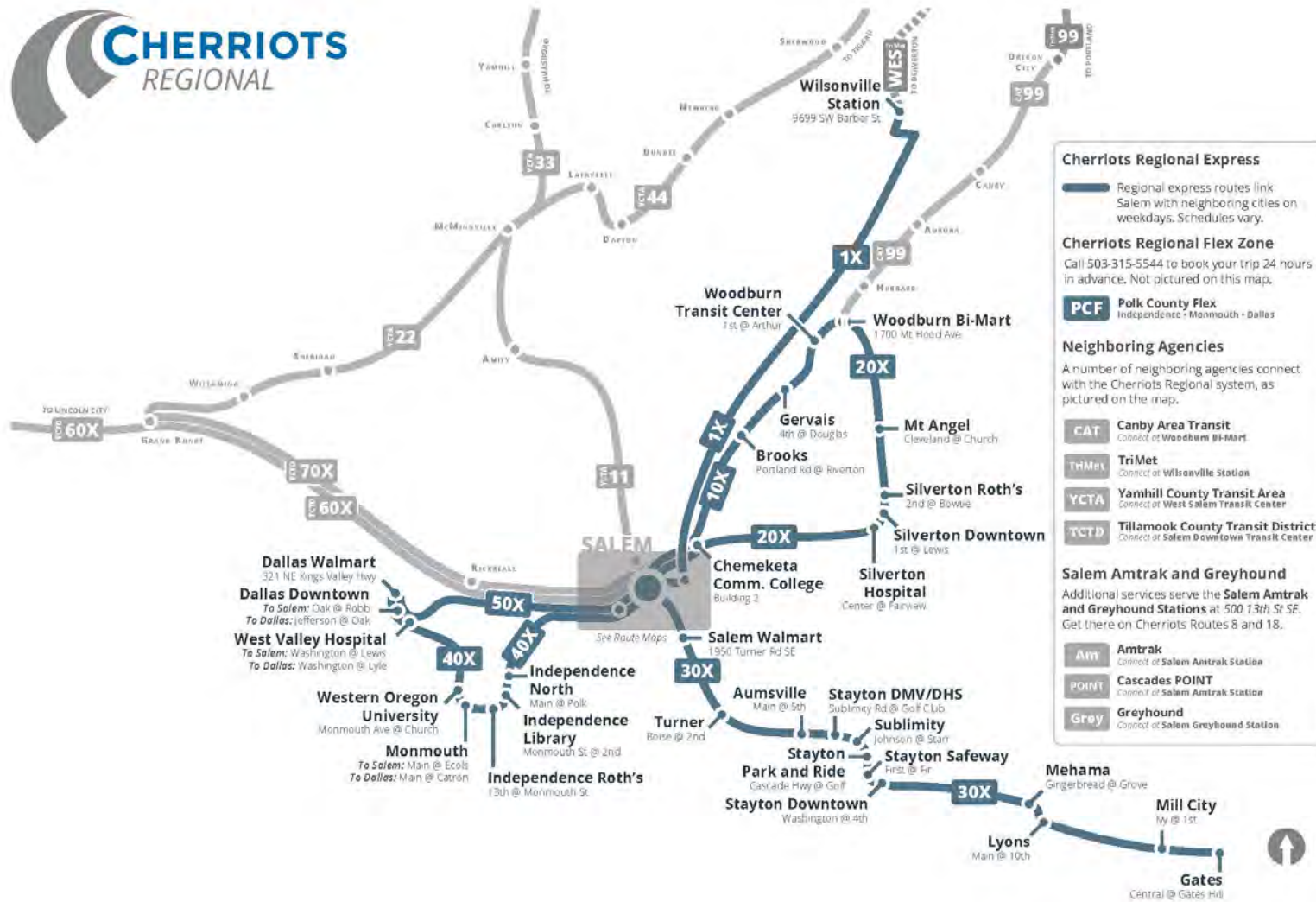
(2) Youth fares will change beginning June 3, 2019.

The Cherriots Regional fleet consists of 11 vehicles. The vehicles seat between 14 and 35 people and are capable of carrying up to two mobility devices. The vehicles range in age from less than a year to 15 years old. The vehicles are owned by Cherriots. Most buses are fitted with a bicycle rack that can transport up to three

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

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

Figure 8. Cherriots Regional System Map



Effective: May 7, 2018

3.4 Cherriots LIFT

Cherriots LIFT is the ADA complementary paratransit service offered by Cherriots within the Cherriots Local service area, which is defined by the Salem-Keizer Urban Growth Boundary. Cherriots LIFT provides origin to destination transportation service for individuals who cannot independently access Cherriots Local. There is a three step application process to determine eligibility for the transportation service. In Fiscal Year 2018, Cherriots LIFT provided about 139,000 rides. At least a 24-hour advanced reservation is required to ride Cherriots LIFT. Service hours and days are the same as Cherriots Local. The fare is \$3.20 each way and can be paid with either cash or a Cherriots LIFT ticket. Cherriots LIFT does not accept Cherriots Local passes. Cherriots LIFT is operated by a contracted transportation provider, currently MV Transportation, Inc. *Data on the Cherriots LIFT vehicle fleet is in **Appendix E**.*

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

The Cherriots Shop and Ride shopper shuttle and dial-a-ride services are administered by Cherriots and operated by MV Transportation, a contracted transportation provider. The Cherriots Shop and Ride, which provides origin to destination transportation services for seniors 60 and older and people with disabilities recorded 9,100 boardings in Fiscal Year 2017. There is no application process for this transportation service. Through Federal Fiscal Year 2017, the Cherriots Shop and Ride had been funded entirely by state and federal grant funds, which are specific to the Salem-Keizer urban area. Data on the Cherriots Shop and Ride vehicle fleet can be seen in **Appendix E**.

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

3.6 Mobility Management

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

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

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

3.7 Cherriots call center and Medicaid brokerage

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

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

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

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

3.8 Woodburn Transit System (WTS)

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

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

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

3.9 City of Silverton Silver Trolley

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

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

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

3.10 West Valley Hospital Connections Van

Jennifer Broadus
525 SE Washington St, Dallas, OR 97338
(503) 917-2024

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

3.11 Silverton Hospital CareVan

Kay Seiler, Volunteer Services Manager
342 Fairview St, Silverton, OR 97381
(503) 873-1786
kseiler@silvertonhealth.org

The Silverton Health medical transportation program, CareVan, provides safe, reliable door to door ambulatory and wheelchair rides to and from medical appointments at Silverton Hospital and its affiliated clinics, providers, services and

programs. Rides are available from private residences or pre-arranged locations within the hospital's service area from 8:30am to 4:00pm, Monday-Friday. Rides are scheduled in advance with a reminder call placed to the client 24 hours in advance of the trip. Rides are provided by two paid drivers that serve our Woodburn and outlying areas, Silverton area rides are provided by a team of committed volunteer drivers and dispatchers. All rides are complimentary, however donations are cheerfully accepted! To schedule a ride, contact (Woodburn) 503.873.1722, or (Silverton) 503.873.1784.

3.12 Cherriots call center

SueAnn Coffin
3140 Del Webb Ave. NE, Salem, OR 97301
(503) 588.2424 ext. 7588
SueAnn.Coffin@cherriots.org

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

3.13 Catholic Community Services

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

3.14 Participating human services agencies

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

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

Chapter 4: Needs assessment

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

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

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

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

4.1 Existing service review

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

- Cherriots services

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

4.2 Needs assessment

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

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

4.3 Transportation service needs

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

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

4.4 Infrastructure needs

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

4.5 Coordination and organizational needs

- Coordinate services that cross jurisdictional and transit provider service area boundaries
 - Reduce duplication of services
 - Maintain and enhance service connectivity among local operators

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

4.6 Marketing, customer service, and outreach needs

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

4.7 Technology needs

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

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

4.8 Capital and funding needs

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

Chapter 5: Priorities and strategies

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

5.1 Priorities

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

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

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

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

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

5.2 Strategies

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

5.3 Transportation service strategies

- Sustain current service levels.
- As funding allows, implement the “A Better Cherriots” plan (addition of weekend, holiday, extended evening service, and more) using State Transportation Improvement Fund (STIF) dollars beginning in September 2019.
- Develop service area guidelines² for Cherriots and use the guidelines to address gaps in public transit services.
- Identify areas with the greatest need for additional or enhanced transit services.
 - Add weekend service on Cherriots Local, Cherriots Regional, and Cherriots LIFT.
 - Extend evening hours on Cherriots Local and Cherriots Regional during the weekdays.
 - Improve frequencies where service is too infrequent.
- Increase capacity of existing volunteer programs by increasing the fleet of accessible vehicles for community-based services.
- Review services such as the former West Salem Connector and identify additional locations in the two-county area this service could be replicated.
- Explore options for circulator, feeder route, and flexible route dial-a-ride services.

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

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

5.4 Infrastructure strategies

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

5.5 Coordination and organizational strategies

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

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

5.6 Marketing, customer service, and outreach strategies

- Develop and distribute information promoting travel options, counseling services, and provide web and application-based information systems.
- Increase communication and marketing efforts to make members of the public and policymakers aware of transportation options.
- Encourage seniors and people with disabilities to use online trip planning tools.
- Explore a fare assistance program for people whose primary barrier to using public transit is financially based.
- Provide more driver training to ensure a positive, consistent customer experience by incorporating feedback from well-regarded drivers.
- Expand travel training programs that cover topics such as how to use the Dial-A-Ride system, make transfers between transit systems and destinations, and use online tools and applications.
- Enhance and develop travel training materials such as videos, educational brochures, and provide on-location presentation by travel trainers.
- Conduct outreach to increase the number and geographic area of volunteer drivers.
- Survey riders for feedback to improve drop-off and pick-up locations.

5.7 Technology strategies

- Develop and test new technology to improve service efficiencies.
- Develop or purchase open source software to enable multiple operators to connect with a single clearinghouse for trip planning and scheduling.
- Work toward providing real-time information for scheduled rides and same-day or on-demand scheduling.
- Develop a centralized information system that can be accessed by people needing information on applicable transportation resources.

5.8 Capital and funding strategies

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

Chapter 6: Unmet needs/strategies and next steps

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

Table 13, below, summarizes the unmet transportation needs in the left column, and suggests a corresponding service strategy in the right column. The list of strategies should be viewed as a “catalogue” of service alternatives and do not necessarily represent programs that have existing funding sources which may be available to initiate or jump-start the strategy. Over time, Cherriots and the STFAC should continually refine and update the list of preferred strategies with the goal of prioritizing those most feasible to pursue, and those that would best address identified unmet needs.

Table 11. Unmet needs and corresponding strategies

Unmet transportation need(s)	Corresponding strategy(s)
<p>Transportation service needs</p> <ul style="list-style-type: none"> • Restoration of services that had been previously cut • Increase service availability • Increase service geographic scope • Increase service quality • Increase Dial-A-Ride (DAR) services • Door-to-door and door-through-door paratransit service in Polk County outside of the Salem-Keizer Urban Growth Boundary and in southern Marion County • Increase service for underserved groups 	<p>Transportation service strategies</p> <ul style="list-style-type: none"> • Implement the “A Better Cherriots” plan (addition of weekend, holiday, extended evening service, and more) • Develop service area guidelines³ for Cherriots • Identify areas with the greatest need for additional or enhanced transit services • Increase capacity of existing volunteer programs • Identify additional locations for service similar to the former West Salem Connector • Explore options for circulator, feeder route, and flexible route Dial-A-Ride services • Improve regional connections between modes and service providers • Explore partnerships with TNCs • Explore opportunities to expand Drive Less Connect

³ See p. 49 for a definition of service area guidelines.

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

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

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

6.1 Next steps

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

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

List of appendices:

Appendix A: Summary of stakeholder workshops held in 2016

Appendix B: 2016 stakeholder workshop comments

Appendix C: People aged 65 years and older demographic data

Appendix D: Social service agency descriptions

Appendix E: Cherriots Vehicle Fleet Maintenance Plan (2018)

Appendix F: Mobility Management Work Plan

Appendix G: Survey results matrix

Appendix H: Sample Public Notice

Appendix I: Sample Web Article

Appendix J: Sample STF Grant Application

Appendix K: Sample STF Grant Application Instructions

Appendix L: Sample 5310(ODOT) Grant Application

Appendix M: Sample 5310(ODOT) Grant Application Instructions

Appendix A: Summary of stakeholder workshops held in 2016

Appendix B: 2016 stakeholder workshop comments

Appendix C: People aged 65 years and older **demographic data**

Appendix D: Public providers

Appendix E: Cherriots Vehicle Fleet Maintenance Plan

Appendix F: Mobility Management Work Plan

Appendix G: Survey Results Matrix

Appendix H: Sample Public Notice

Appendix I: Sample Web Article

Appendix J: Sample STF Grant Application

Appendix K: Sample STF Grant Application **Instructions**

Appendix L: Sample 5310(ODOT) Grant Application

Appendix M: Sample 5310(ODOT) Grant Application Instructions

Appendix D: Public providers

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

D.1 Canby Area Transit (CAT)

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

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

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

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

CAT operates a dial-a-ride service for members of the general public who are traveling to or from destinations within the Canby Urban Growth Boundary. Service is available from 8 a.m. to 6 p.m., Monday through Friday. Service is not available during major holidays. Dial-A-Ride vehicles are equipped with wheelchair lifts, prioritized seating for seniors and people with disabilities, and bicycle racks. Paratransit service is available for eligible people who are unable to use shuttles or fixed route buses. Reservations can be made via phone up to 14 days in advance. General dial-a-ride service costs \$1.00 per ride.

D.2 South Metro Area Regional Transit (SMART)

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

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

SMART fares are shown in **Table 11**. Service is free on Routes C, V, 4, 5, 6, and 7 that operate within Wilsonville. Universal monthly passes for all routes are available for \$85 (\$42.50 for youth, seniors, disabled, or Medicare card holders).

Table 1. SMART Fares

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

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

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

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

Table 2. TriMet fares

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

LIFT is TriMet’s shared-ride service for people who are unable to use regular buses or trains because of a physical or mental disability. Passengers must apply and be registered customers in order to use LIFT. The LIFT service area covers all locations within TriMet’s service boundary that are within three-fourths of a mile of any TriMet bus and light rail route. Service hours are similar to TriMet’s regular service window and are available from 4:30 a.m. to 2:30 a.m. daily. Advance reservation is required for all trips, and must be made before 5 p.m. on the day before the trip.

More information on TriMet's LIFT program can be found online at this URL: trimet.org/pdfs/lift/liftguide.pdf

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

D.4 Yamhill County Transit Area (YCTA)

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

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

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

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

D.5 Albany Transit

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

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

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

D.6 Tillamook County Transportation District

The Tillamook County Transportation District (TCTD) took over service between Salem and Grand Ronde that was formerly provided by Cherriots (Route 2X) in January 2018. Now, TCTD's Routes 60X and 70X offer seven daily round trips to Grand Ronde. The 70X serves the Rickreal park and ride lot in Polk County and also goes to Spirit Mountain Casino (the largest employer in Grand Ronde), and the Grand Ronde Health and Wellness Center. The Coastal Connector (Route 60X) provides seven-day a week service between Salem and Lincoln City running three round trips per day, including stops at the Chinook Winds Casino in Lincoln City and Rose Lodge (located about half way between Lincoln City and Grand Ronde). The 60X and 70X routes serve both the Downtown Salem Transit Center and the Salem Amtrak/Greyhound Station to provide intercity connections with Greyhound, Amtrak, and Cascades Point buses as well as the Cherriots Local and Regional bus systems.

D.7 Polk County Falls City Direct Connect

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

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

FCDC services are open to the public and the bus is equipped with a wheel chair lift to support riders with disabilities. Currently, the FCDC operates every Tuesday and Thursday to Dallas and once a month to Monmouth. Bus times, routes and stops are planned based on community input and identified need.

D.8 Disabled American Veterans Transportation

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

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

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

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

D.9 Marion County Housing Authority

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

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

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

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

One of the key volunteer needs in Marion County is drivers for the volunteer dial a ride service coordinated through Woodburn Transit. The dial a ride program arranges for volunteer drivers to take elderly Woodburn residents and those with disabilities to medical appointments in all areas between Portland and Salem.

Volunteer drivers use their personal vehicles and are reimbursed for their mileage at the federal rate. Requests for reservations must be made at least one day in advance and can be made by calling the City of Woodburn at 503.982.7433. There is no charge for the service and drivers are not permitted to accept tips; however, donations are accepted for the service.

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

D.11 Northwest Senior and Disability Services

Northwest Senior and Disability Services provides assistive services to seniors and persons with disabilities. Services include adult protective services, in-home care, meal programs, employment services, counseling, volunteer opportunities, and medical and financial assistance. The organization does not offer transportation services to clients but refers them to transportation brokerages like Cherriots call center. In general, people who do not use public transportation use their own personal vehicles and mileage is reimbursed for medical trips through the Medical Assistance Program.

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

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

D.12 Oregon Commission for the Blind

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

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

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

D.13 Oregon Health Authority

The Oregon Health Authority (OHA) provides coordination assistance and contracts for Medicaid non-emergent medical transportation (NEMT) brokerages, senior and disabled non-medical transportation, and vocational rehabilitation ride vouchers. OHA pays for transportation for their clients, with rides being booked through the Cherriots call center. Transportation is scheduled with the most appropriate and cost-effective means that meets a client's needs, including the following types of transportation services: bus (tickets/pass); wheelchair van/bus; taxi or sedan; secure transport; stretcher car. Staff also provides transportation for foster children and mileage vouchers to clients for medical trips. In addition to using the above services, OHA clients use Veterans' Affairs transportation as well as the RSVP volunteer driver program, although these are not coordinated for clients through OHA.

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

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

D.14 Resource Connections of Oregon

Resource Connections of Oregon (RCO) is a non-profit corporation which helps adults with developmental disabilities to live independently. The organization uses personal agents who work with each customer to provide a self-directed plan including services such as finding supported employment, living support, family

training, and securing non-medical transportation. RCO distributes federal and state funding under the direction of the customer to assist in the improvement of the customer's quality of life and independence. The organization operates in Marion, Yamhill, and Linn counties with about 720 customers.

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

D.15 Shangri-La Corporation

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

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

D.16 Private providers

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

Amtrak

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

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

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

Greyhound

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

HUT Airport Shuttle

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

The trip takes approximately an hour from Woodburn and an hour and 15 minutes from Salem.

Spirit Mountain Casino Shuttle

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

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

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

Taxis

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



SECTION 5310

PROGRAM MANAGEMENT PLAN

Enhanced Mobility for Seniors and People with Disabilities

March 2019



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1. INTRODUCTION

This Program Management Plan (PMP) describes the Salem Area Mass Transit District (also known as Cherriots) policies and procedures for administering the Federal Transit Administration's (FTA) 49 U.S.C. 5310 (Section 5310) Enhanced Mobility of Seniors and Individuals with Disabilities program. Due to the fact that the Salem-Keizer urbanized area (UZA) population exceeds 200,000 people, Cherriots is a designated recipient of Section 5310 funds by FTA's rule. Cherriots also receives funds through the Oregon Department of Transportation (ODOT) 5310 program for urban and rural projects. This PMP specifically addresses only the Section 5310 dollars obtained directly from the FTA, and not passed through ODOT. The ODOT Rail and Public Transit Division State Management Plan should be consulted for the pass-through ODOT 5310 grant program.

This PMP articulates a vision for Cherriots future with programs that focus on the maintenance of critical services, while strategically developing opportunities for the growth of services and facilities for the years to come. Cherriots has identified a growing need for public transportation in the Salem-Keizer area, with a focus to connect individuals with employment, education, and vital services. The focus of Section 5310 programs is to provide transportation for seniors and individuals with disabilities where public transportation is insufficient, inappropriate, or unavailable.

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

The current Federal Transportation Bill, also known as Fixing America's Surface Transportation (FAST) Act, continues the changes made by the previous federal legislation bill: Moving Ahead for Progress in the 21st Century Act (MAP-21). MAP-21 legislation brought about many changes to FTA programs when it was signed in July 2012. The FAST Act passed in December 2015 did not affect policies related to this Program Management Plan (PMP). This plan is developed to specifically meet Section 5310 guidance provided in FTA Circular 9070.1G. Title 9 of Chapter VII in the circular requires the development of a PMP.

In order to make informed decisions about transportation for seniors and individuals with disabilities, the Cherriots Board of Directors appoints an advisory committee to work with Cherriots staff on these issues. This committee is called the Special Transportation Fund Advisory Committee (STFAC) and was initially set up under a mandate from ODOT, which administers Oregon's Special Transportation Fund (STF). This fund comes from state sources and is allocated by the Legislature every two years. The STF is administered by ODOT and its main focus is transportation for seniors and individuals with disabilities. Therefore, Cherriots has chosen many components of the STF grant selection and award process for the FTA-direct Section 5310 grant process.

The STFAC is appointed by the Board and is made up of seniors, individuals with disabilities, and members of the public interested in improving transportation for these groups. It meets as many times as necessary to advise the STF Agency and carry out the purposes of the Special Transportation Fund. At a minimum, the STFAC must meet twice a year. The STFAC also receives the applications for Section 5310(ODOT) projects every two years. The STFAC acts in an advisory function to the Cherriots Board of Directors, who have the final authority for making funding determinations for Section 5310 grants in Marion and Polk counties.

A state administrative rule requires that STF Agencies prepare a plan to guide the investment of STF moneys to maximize the benefit to the elderly and individuals with disabilities within that area. In early 2007, the ODOT issued guidance to STF agencies to indicate that STF and Section 5310 planning efforts would be combined into a single document, referred to as the Coordinated Public Transit – Human Services Transportation Plan for Polk and Marion Counties (“The Coordinated Plan”). This document is used for the 5310(FTA) grant, the 5310(ODOT) grant, and the STF allocation.

The Coordinated Plan was developed to document and facilitate discussion about community transportation needs for seniors and individuals with disabilities in Marion and Polk counties, which include the Salem-Keizer UZA. The Coordinated Plan provides information about current services as well as identified needs in the community for new transportation services.

1.1 Eligible activities

The FAST Act requires that at least 55 percent of the Section 5310 Program funding apportionment be used for one of the following:

- Capital expenses for public transportation projects that are planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities (i.e. “traditional” Section 5310 capital projects) when public transportation is insufficient, unavailable, or inappropriate.
- Section 5310-funded vehicles and facilities:
 - Rolling stock and related activities
 - Passenger facilities
 - Support facilities and equipment
 - **All vehicles purchased with Section 5310 funding must be ADA accessible.**
- A lease of equipment when lease is more cost-effective than purchase.
- An acquisition of transportation services under a contract, lease, or other arrangement.
- Support for mobility management and coordination programs amongst public transportation providers and other human service agencies providing transportation.
- Purchase of capital activities to support ADA-complementary paratransit service

Projects must directly serve and have a specific benefit to seniors and individuals with disabilities.

The remaining 45 percent of the funds may be used for operating or capital expenses associated with:

1. General
 - a. Public transportation projects (capital only) planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable;
 - b. Public transportation projects (capital and operating) that exceed the requirements of the ADA;
 - c. Public transportation projects (capital and operating) that improve access to fixed route transit service and decrease reliance by individuals with disabilities on ADA-complementary paratransit; or
2. Alternatives to public transportation (capital and operating) that assist seniors and individuals with disabilities

All requested operating expenses must have a functional relationship to transportation for seniors and/or individuals with disabilities.

1.2 Funding for projects and program administration

Section 5310 Program funds will be awarded on an annual cycle. The Section 5310 Program can generally fund up to 80 percent of a project's capital costs (in some limited cases, up to 90 percent) and up to 50 percent of a project's operating costs. Administrative costs necessary for the designated recipient to coordinate the Section 5310 Program (up to 10 percent of the federal apportionment to each urbanized area) are funded at 100 percent federal share. Eligible administrative expenses include general overhead costs, planning, technical services, and other eligible costs described in the Office of Management and Budget (OMB) Circular 2 CFR 200.

The designated recipient is eligible to be reimbursed for Section 5310 administrative costs. Sub-recipients will not be reimbursed for administrative costs related to application development, program reporting, or other activities.

The remaining costs (typically the required match for the federal funds) can be covered by:

- Other federal (non-DOT) transportation funding sources
- State and local funding sources
- Private funding sources

It is the responsibility of the sub-recipient to secure and administer funds outside the Section 5310 program.

1.3 Purpose of the Program Management Plan

This PMP serves as the guidebook for the administration of Section 5310 funds for the Salem-Keizer urbanized area. FTA Circular 9070.1G Enhanced Mobility of Seniors and Individuals with Disabilities Program Guidance and Application Instructions provides guidance for Section 5310 projects. It covers project requirements, administration procedures, and other relevant components of the Federal Section 5310 Program. FTA Circular 9070.1G requires that a PMP be designed to identify the policies and procedures for administering the Section 5310 Program in a large urbanized area. These policies and procedures are based on program requirements issued by the FTA. The PMP serves as a local companion to

FTA Circular 9070.1G by describing the roles and mechanisms for carrying out policies and procedures in the Salem-Keizer UZA and meeting the FTA requirement for a Program Management Plan.

1.4 Roles and responsibilities of the designated recipient and Cherrlots for the Section 5310 Program

In the FAST Act and FTA Circular 9070.1G, the governor of each state, or an official designee, and responsible local officials must designate a public entity in a large urbanized area with a population of 200,000 or more to be the recipient of Section 5310 funds. Cherrlots is the designated entity for the Salem-Keizer UZA, which has an approximate population of 230,000 according to 2015 estimates of the American Community Survey (U.S. Census Bureau). The designated recipient must have the requisite legal, financial, and staffing capabilities to receive and administer federal funds under this program, which involves managing grant agreements with sub-recipients, applying for federal funds, ensuring compliance with all federal and state requirements, and completing grant reporting to the FTA.

To distribute Section 5310 Program funds within the Salem-Keizer UZA, Cherrlots staff manages a competitive selection process and ensures a fair distribution of Section 5310 funds through a fair selection and prioritizing of projects for funding. Cherrlots staff also prepares and maintains the PMP. The process for selecting projects is further described in Section 6 below.

The designated recipient is primarily responsible for applying to FTA for Section 5310 grants on behalf of itself and/or the sub-recipient(s). In addition, the designated recipient is responsible for the development of a Program of Projects (POP), which identifies the sub-recipients and projects for which the recipient is applying for financial assistance. In the Salem-Keizer UZA, Cherrlots staff will prepare the POP for submission to the FTA. In addition, the designated recipient manages all aspects of grant distribution, including reporting to the FTA.

1.5 Definitions

ADA – Americans with Disabilities Act

C_9070.1G – Circular authored by the FTA detailing the Section 5310 program

CFR – Code of Federal Regulations

DBE – Disadvantaged Business Enterprise

DCE – Documented Categorical Exclusion

DOT – U.S. Department of Transportation

EEO – Equal Employment Opportunity

FMVSS – Federal Motor Vehicle Safety Standards

FTA – Federal Transit Administration

JARC – Job Access and Reverse Commute

MAP-21 – Moving Ahead for Progress in the 21st Century Act

MIS – Management Information System

MWVCOG – Mid-Willamette Valley Council of Governments

NTD – National Transit Database

ODOT – Oregon Department of Transportation

OMB – Office of Management and Budget

PMP – Program Management Plan

POP – Program of Projects

SAFETEA-LU – Safe Accountable Flexible Efficient Transportation Equity Act: A Legacy for Users

SAMTD – Salem Area Mass Transit District

Section 504 – Section 504 of the Rehabilitation Act of 1973 which protects qualified individuals from discrimination based on their disability

Section 5310 – Chapter 49 of the U.S. Code, Section 5310: grant program: “Enhanced Mobility of Seniors and Individuals with Disabilities Program”

STF – Special Transportation Fund

STFAC - Special Transportation Fund Advisory Committee

STF Agency – One of 42 agencies in the State of Oregon designated to receive STF formula funds and responsible for developing its own program policies and procedures to implement the law, and to meet its needs.

TAC – Technical Advisory Committee

TIP – Transportation Improvement Program

Title VI – Title VI of the Civil Rights Act of 1964

UZA – Urbanized Area

2. PROGRAM GOALS AND OBJECTIVES

This section includes Cherriots goals and the Board of Directors’ guiding principles taken from the Cherriots Strategic Plan.

2.1 Cherriots objectives and guiding principles

The seven-member Board of Directors of Cherriots is an elected board where each member represents a certain geographic area within the Salem-Keizer urban growth boundary. Beginning on July 1, 2019, the Board will be appointed by the State of Oregon governor. Four out of the seven positions will be replaced at that time. The others will serve the remainders of their terms on the board.

The board has identified a set of guiding principles to assist staff in translating Cherriots mission statement into specific actions and policies. They target strategic topics of system operation and help define the steps that need to be taken to progress toward Cherriots mission. Table I-1 presents each element along with a brief synopsis of the board’s directions on each topic.

Table I-1. Cherriots Board of Directors’ guiding principles

Strategic Topic	Overview
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<i>Service levels</i>	<ul style="list-style-type: none">● Grow the service level significantly, but on a measured and reasonable basis● Coordinate growth with local jurisdictions' land use and transportation plans
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Table I-1 (continued). Cherriots Board of Directors' guiding principles

<p><i>Productivity and coverage</i></p>	<ul style="list-style-type: none"> ● Provide service in all areas where there is sufficient demand ● Dedicate new resources, 75% to improve productivity of service (ridership), and 25% to improve coverage throughout the community without consideration for expected boardings per revenue hour
<p><i>Funding options</i></p>	<ul style="list-style-type: none"> ● Seek to diversify transit's funding base ● Work with partners to leverage and coordinate transit funding
<p><i>Land use / transportation infrastructure</i></p>	<ul style="list-style-type: none"> ● Focus service improvements in areas that support transit friendly development ● Promote the importance of the interconnections of land use and transit planning
<p><i>Efficiency</i></p>	<ul style="list-style-type: none"> ● Make efficiency a key organizational value ● Identify internal efforts to manage costs and promote innovative solutions
<p><i>Fare policies</i></p>	<ul style="list-style-type: none"> ● Review fares every two years, and link them to an expected rate of farebox return ● Keep fare increases as small as possible, linked to an inflationary index ● Maintain discounted bus passes
<p><i>Regional development</i></p>	<ul style="list-style-type: none"> ● Take a leadership role in facilitating development of regional public transit services ● Seek opportunities to expand services cooperatively to outlying areas ● Support and encourage local jurisdictions in developing transit services
<p><i>Technology</i></p>	<ul style="list-style-type: none"> ● Distinguish between organization technologies and enhancement technologies, and establish appropriate priorities

2.2 Policies and action statements

Based on the Board’s mission and guiding principles, the seven “action statements” below establish the backbone of the PMP. Although not specifically stated in each policy and action statement below, these pertain directly to transportation services for seniors and individuals with disabilities funded through the Section 5310 grant, as well as the general customer riding transit.

2.2.1. *Build transit’s capacity*

Policy statement

Cherriots will seek to:

- Plan, develop, and phase implementation of a route structure focused on the Core Network, centers, neighborhood shuttles, and corridors
- Provide a range of services designed to meet the public’s needs (e.g. bus, carpool, and services to seniors, the disabled, and low-income persons)
- Provide a minimum of 30-minute headways during all hours of weekday service on the Core Network, with a goal of 15-minute headways during peak hours on the Core Network
- Ensure that major investments in public transit respond to customer needs and maximize customer value
- Develop transit’s maintenance and supportive infrastructure to enable growth in fleet, routes, and services

Building capacity means more service and a greater range of services, accessible to more people, over a greater span of time. In this context, capacity can be added in several ways, including greater frequency of service, larger buses to accommodate more riders, longer hours in the service day, greater variety of service, or more days of service, specifically Saturdays, Sundays, and holidays.

2.2.2. Increase service convenience

Policy statement

Cherriots will seek to:

- Promote and continue to increase bus pass usage, through pass programs and discounts on passes
- Promote services and programs which will make transit travel times more competitive with the automobile
- Ensure that Cherriots LIFT services offer comparable access, quality, and service convenience as offered by fixed route services
- Advocate for one-quarter mile walking access to infrequent routes from all major residential areas that will not be served directly by local bus service; one-half mile walking distance is the standard for frequent bus service running every 15 minutes or less
- Preserve and strengthen the core network as defined by the Core Network policy (Board policy #118)
- Provide service quality and facilities that will attract new riders
- Ensure that major investments in public transit are customer-driven
- Increase availability and timeliness of scheduled route information

The local bus service provided within the Salem-Keizer urban growth boundary is named Cherriots Local. About 70 percent of Cherriots Local riders are people who do not have other transportation options available to them. The other 30% have an option—perhaps it is driving, biking, or walking—but they choose to use the bus. If public transit is to succeed at carrying more people and accomplishing the goals of relieving traffic congestion, it needs to attract more people who are currently in cars. To do this, public transit’s image needs to improve in the eyes of the public. Cherriots Local needs to provide the capacity to carry more riders, but also provide the incentives that will retain current customers and enhance the attractiveness of the system to a broader range of users.

Often overlooked in the efforts to upgrade public transit are the service needs of the community's disabled transit customers who utilize the Cherriots LIFT system. Many of these people have few transportation options available, and any transit plans being undertaken must provide for improved paratransit capacity and convenience measures that mirror the efforts being taken to improve local bus service.

2.2.3. Enhance mobility

Policy statement

Cherriots will seek to:

- Provide weekend/holiday and later evening service
- Provide a service level that enables most residents inside the urban growth boundary to fully access their community and the basic activities and opportunities it offers, without the necessity of using an automobile
- Provide increased mobility options to seniors and individuals with disabilities
- Establish transit service in areas which are currently unserved, subject to objective performance standards and expectations
- Consider the costs and benefits to a demand response service for low-density neighborhoods similar to the West Salem Connector

Mobility is the product that public transit provides to the community. It is the mix of services that enable people to get from where they are to where they want to go, at the times they need to go, and at a cost they can afford.

2.2.4. Lead transit's development

Policy statement

Cherriots will seek to:

- Take the lead role in defining transit policy and advocate for the development of public transportation in the Salem-Keizer urbanized area
- Participate actively in the transportation planning processes carried on by local jurisdictions and official advisory bodies
- Support and coordinate with the City of Salem, City of Keizer, and Marion and Polk counties (unincorporated areas within the urban growth boundary) in the development and implementation of transit-supportive transportation and land use decisions
- Develop and maintain a skilled, well-trained workforce that has the resources and leadership to accomplish Cherriots' goals

Oregon State Statutes provide Cherriots the responsibility and authority to develop public transit services in the Salem-Keizer UZA. Today more than ever, the future success of transit services depends upon the coordinated actions of many other participants in the public policy realm. It is up to Cherriots—board and staff—to take a leadership role in educating the community about transit's benefits, pledging and delivering transit's support in cooperatively addressing transportation challenges, and being accountable to our partners and the public in the services we provide.

2.2.5. Increase efficiency

Policy statement

Cherriots will seek to:

- Target transit investments to areas in the community where land uses, zoning, and transportation policies are supportive of public transit
- Base service decisions on Cherriots Service Guidelines for bus service
- Acquire transit vehicles that are suited to the varying service patterns of the operation
- Invest in system improvements that convey travel time advantages to transit
- Where appropriate, contract out and out-source functions and services

Funding for public services in Oregon is tight and competitive, and the public expects a high level of organizational and operational efficiency for its tax dollar. One of the primary areas of emphasis in this management plan is in increasing the efficiency and effectiveness of the service provided to the Salem-Keizer area.

The plan also calls for a system of measuring and evaluating progress, and reviewing Cherriots performance over time, and in comparison with the job being done by other comparable Northwest transit agencies. Quarterly and annual evaluations of service will help Cherriots make practical and timely decisions about the services it provides.

2.2.6. Enhance revenues

Policy statement

Cherriots will seek to:

- Diversify and expand transit's funding base
- Adopt fare policies which ensure that transit users pay an equitable share of the system's operating costs
- Coordinate with local jurisdictions to optimize the allocation of tax resources
- Actively pursue grant opportunities for all eligible Cherriots programs

Only two significant sources of local revenue are subject to Cherriots control: property taxes and passenger fares. Other major sources include State funding (including the statewide payroll tax instituted by HB 2017), federal funds, and revenues. Federal funding has shown reasonable increases over the years, but is at the discretion of governmental budgeting policy. State funding has been reasonably consistent and has grown, but it too is at the discretion of the governor and legislature.

2.2.7. Ensure safety and security

Policy statement

Cherriots will seek to:

- Ensure safe and secure transit facilities
- Continuously monitor and evaluate the safety of transit customers
- Provide appropriate safety training to all Cherriots staff

The safety of passengers in Cherriots buses and facilities is as fundamental a concern for Cherriots as providing mobility. The public has indicated that security is a major issue. Any sub-recipient receiving Section 5310 grant funds would also be expected to provide similar levels of security.

2.3 A coordinated planning process

The goal of the FTA Section 5310 Program administered by Cherriots falls in line with federal guidelines. This goal is to improve mobility for seniors and individuals with disabilities by removing barriers to transportation services and expanding the transportation mobility options available in the Salem-Keizer UZA. A complementary state-run program called the Special Transportation Fund (STF) also provides funding for seniors and individuals with disabilities. As mentioned in the introductory remarks above, many of the processes of administering the Section 5310 Program follow the same process as the STF Program since the goals and objectives of the two programs are very similar, and the Board of Directors has established this process which has proved successful for over 30 years.

Before a project can be awarded funds, the project must be certified by the Cherriots Board of Directors that it is included in a locally developed Coordinated Plan. The Coordinated Plan was significantly updated in 2016 to establish long-term goals for providing transportation services to seniors and individuals with disabilities, including the process for long-range planning and consultation with elected officials. The Coordinated Plan lists several strategies which articulate the regional goals and objectives of the Section 5310 Program. Table I-2 lists eligible project strategies to meet these identified needs.

Table I-2. List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and people with disabilities in the Salem-Keizer UZA

Unmet Transportation Need	Strategy
<p>Transportation service needs</p> <ul style="list-style-type: none"> ● Restoration of services which had been previously cut ● Increase service availability ● Increase service geographic scope ● Increase service quality ● Increase Dial-A-Ride services ● Door-to-door and door-through-door paratransit service in Polk County outside of the Salem UZA and in southern Marion County ● Underserved groups 	<p>Transportation service strategies</p> <p>vice Strategies<u>strategies</u></p> <ul style="list-style-type: none"> ● Implement “A Better Cherriots” plan (addition of weekend, holiday, extended evening service, and a student bus pass program to Cherriots Local and Cherriots LIFT buses) ● Identify areas with the greatest need for additional or enhanced transit services ● Increase capacity of existing volunteer programs ● Identify additional locations for service similar to the former West Salem Connector ● Explore options for circulator, feeder route, and flexible route Dial-A-Ride services ● Improve regional connections between modes and service providers ● Explore partnerships with Transportation Network Companies ● Explore opportunities to expand Drive Less Connect

Table I-2 (continued). List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and people with disabilities in the Salem-Keizer UZA

Unmet Transportation Need	Strategy
<p>Infrastructure needs</p> <ul style="list-style-type: none"> ● Bus stops ● Pedestrian improvements ● Small transit centers in communities without a transit center or major transit stop with a shelter 	<p>Infrastructure strategies</p> <ul style="list-style-type: none"> ● Prioritize bus stops that need improvements ● Review existing pedestrian plans for opportunities and funding sources to improve sidewalk and pedestrian infrastructure ● Coordinate with local jurisdictions to identify opportunities to improve stop accessibility during roadway construction or development projects ● Advocate for age- and disability-friendly streets ● Create facilities and transit centers that provide services to seniors and people with disabilities

Table I-2 (continued). List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and people with disabilities in the Salem-Keizer UZA

Unmet Transportation Need	Strategy
<p>Coordination and organizational needs</p> <ul style="list-style-type: none"> ● Coordinate services that cross jurisdictional and transit provider service area boundaries ● Coordinate services among social service agencies, senior centers, medical facilities, employers, and other organizations to share information about local transportation options, training opportunities, and other information ● Central dispatch for transportation services ● Fare sharing services such as the ability to use the Day Pass on both the Cherriots Local and Regional systems ● Apply technological solutions to facilitate coordination efforts 	<p>Coordination and organizational strategies</p> <ul style="list-style-type: none"> ● Regularly review the Coordinated Plan with the STFAC to evaluate progress ● Coordinate with rider groups and destinations to optimize trip scheduling ● Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles ● Expand awareness of home delivery services ● Monitor Oregon Health Plan funded non-emergency medical transportation for coordination opportunities ● Review the Legacy Silverton Medical Center CareVan program for opportunities to coordinate trips for passengers along route ● Encourage seniors and people with disabilities to utilize online trip planning tools

Table I-2 (continued). List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and people with disabilities in the Salem-Keizer UZA

Unmet Transportation Need	Strategy
<p>Marketing, customer service, and outreach needs</p> <ul style="list-style-type: none"> ● Increase accountability, customer service, responsiveness, and human interaction ● Increase the amount of information available in Spanish ● Improve transit service branding to differentiate services (continue brand refresh launched in 2017) ● Improved access to and availability of information, education, and outreach about the range of transportation providers and services is needed in both the urban and rural areas ● Increase frequency and breadth of marketing/advertising ● Increase in the number of volunteer drivers 	<p>Marketing, customer service, and outreach strategies</p> <ul style="list-style-type: none"> ● Develop and distribute information promoting travel options services and provide web-based and application-based information systems ● Improve communication and marketing efforts to increase awareness of transportation options ● Explore a fare assistance program for riders ● Provide more driver training to ensure a positive, consistent customer experience by incorporating feedback from well-regarded drivers ● Expand Travel Training programs ● Enhance and develop Travel Training material ● Conduct outreach to increase the number and geographic locations of volunteer drivers ● Survey riders for feedback to improve drop-off and pick-up locations

Table I-2 (continued). List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and people with disabilities in the Salem-Keizer UZA

Unmet Transportation Need	Strategy
<p>Technology needs</p> <ul style="list-style-type: none"> ● Cherriots Regional vehicles need fareboxes identical to Cherriots Local buses for fare integration ● Security cameras on Cherriots Shop and Ride vehicles and some Cherriots LIFT vehicles (cameras are not currently in any Cherriots LIFT MV-1 vehicles) ● Speaking/digital schedules at bus stops ● Electronic signs at transit centers and major bus stops listing the next bus arrival ● Equip buses with Automatic Vehicle Location and/or GPS systems for real-time tracking ● Text alerts on additional transit services ● Expand on the ongoing web-based ride reservation system pilot project with Willamette Valley Community Health and/or the West Salem Connector web-based booking system 	<p>Technology strategies</p> <ul style="list-style-type: none"> ● Develop and test new technology to improve service efficiencies ● Develop or purchase open-source software to enable multiple operators to connect with a single clearinghouse for trip planning and scheduling ● Work towards providing real-time information for scheduled rides and same-day or on-demand scheduling ● Develop a centralized information system that can be accessed by people needing information on applicable transportation resources

Table I-2 (continued). List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and people with disabilities in the Salem-Keizer UZA

Unmet Transportation Need	Strategy
<p>Capital and funding needs</p> <ul style="list-style-type: none"> ● Bus and equipment replacements ● High quality buses that meet a range of physical needs for seniors and individuals with disabilities ● Service additions and enhancements ● Fare subsidies 	<p>Capital and funding strategies</p> <ul style="list-style-type: none"> ● Advocate for increased funding and seek out new and innovative funding opportunities ● Seek stable funding that continues the funding stream of HB 2017, which supports ongoing operations and capital expenses ● Review bus inventory against route/rider needs ● Advocate for adequate capital replacements ● Continue to develop and implement vehicle maintenance schedules ● Review funding application process and application materials on a biennial basis

3. ROLES AND RESPONSIBILITIES

Cherriots serves as the designated recipient for FTA Section 5310 funds for the Salem-Keizer UZA. As the designated recipient of these funds, Cherriots conducts a selection process to determine the use of the funds, and to certify that projects were derived from the Coordinated Plan. Cherriots separates the selection process for FTA-direct Section 5310 dollars with the process for selecting ODOT pass-through Section 5310 dollars, but the procedures for selecting projects for the two programs are the same. These procedures involve the STFAC, the Board-appointed committee which acts in an advisory function to the Cherriots Board of Directors, who have the final authority for making funding determinations. The STFAC conducts the screening and selection process for Section 5310 grant applications as well as STF grant applications. If selected by the Cherriots Board of Directors for a grant, the sub-recipient, as defined in Part IV “Eligibility requirements,” enters into a formal contract with Cherriots ensuring that all state and federal laws and regulations are followed.

The Oregon Department of Transportation (ODOT) administers Oregon’s Special Transportation Fund, which designates the counties, transportation districts, and Indian tribes as STF Agencies to administer STF in their respective jurisdictions. Cherriots is one such designated STF Agency in the state. The STF has a similar mission to the federal 5310 grant program since it was established to support seniors and individuals with disabilities. An administrative rule requires that all STF Agencies prepare a plan to guide the investment of STF moneys to maximize the benefit to the elderly and individuals with disabilities within that area. In early 2007, ODOT issued guidance to STF Agencies to indicate that the two planning efforts would be combined into a single document, referred to as a “Coordinated Plan.”

3.1 Cherriots roles and responsibilities

The following are the administrative roles and responsibilities of Cherriots as it provides Section 5310 funds to its sub-recipients:

- Develop, execute, manage, and amend grant agreements with sub-recipients;
- Apply for federal funds on behalf of eligible sub-recipients as identified by Cherriots and manage the program’s federal grants;
- Complete program grant reporting to the FTA on a quarterly and annual basis;

- Work with sub-recipients to procure capital items and ensure compliance with all applicable state and federal requirements;
- Process payments, draw down federal funds, complete financial audits, and complete grant closeouts;
- Collect and maintain financial reports, operating statistics, and vehicle data from sub-recipients;
- Monitor sub-recipient compliance with federal requirements (Title VI, Section 504, ADA, etc.);
- Conduct on-site inspections of sub-recipient projects;
- Amend the Cherriots Title VI Program, Equal Employment Opportunity (EEO) Plan, Disadvantaged Business Enterprise (DBE) Goals, and other applicable documents to include the FTA-Direct Section 5310 Program;
- Review sub-recipients' Title VI, EEO, and DBE programs;
- Investigate and address Title VI, EEO, and DBE complaints;
- Monitor sub-recipients' adherence to maintenance plans and safety standards;
- Develop and revise the program's Program Management Plan (PMP);
- Develop and approve the annual Program of Projects (POP) and ensure that the regional Transportation Improvement Program (TIP) is amended by the Mid-Willamette Valley Council of Governments (MWVCOG), as necessary;
- Develop and revise the Public Transit – Human Services Transportation Coordinated Plan for Marion and Polk Counties at least every three years in partnership with ODOT;
- Notify eligible sub-recipients of application cycles and distribute project application materials;
- Determine sub-recipient and project eligibility;
- Maintain a list of eligible sub-recipients;
- Provide technical assistance to eligible sub-recipients;

Develop and conduct the project selection process, which includes:

- Develop the application form to distribute to eligible sub-recipients;
- Create a Technical Advisory Committee (TAC) to score and select projects for funding;
- Release a solicitation for project applications to eligible sub-recipients;
- Develop project selection criteria;
- Receive and review project applications from sub-recipients;
- Present project funding recommendations to the STF Advisory Committee;

- Advertise TAC and STFAC meetings on the Cherriots.org website to provide the public and private transportation providers with notice and an opportunity to comment on projects selected for funding;
- Notify successful sub-recipients of their award amounts and reporting requirements;
- Once the funding recommendation is approved by the SAMTD Board of Directors, SAMTD staff submits the approved applications to the FTA for final approval. Once approved, SAMTD staff will draft agreements with recipients and post a copy on the FTA's Transit Award Management System (TrAMS).
- The Coordinated Plan is a living document and updates shall be made continuously. Coordination of projects to ensure compliance shall be an annual review and solicitation of projects to ensure at least 55 percent is used for traditional Section 5310 projects; and
- Provide demographic data to help sub-recipients comply with Title VI requirements.

3.2 Sub-recipient roles and responsibilities

The following are the roles and responsibilities of sub-recipients as they receive Section 5310 funds:

- Inform Cherriots staff of their intention to apply for Section 5310 Program funds, complete and submit application(s), provide project description(s) and funding information, provide follow-up information, and participate in interviews and/or on-site visits if conducted;
- Work with Cherriots staff to procure capital items; assure the procurement regulations are met;
- Develop and maintain a Maintenance Plan to be held on file with Cherriots;
- Inspect, insure, and maintain all vehicles funded through the program;
- Complete and submit acceptance certifications to Cherriots upon vehicle delivery;
- Deliver the project as described in the grant project application, including local management and administration;
- Provide financial management of the project, including provision of matching funds and assurance that Section 5310 funds are used for the project identified in the project application;
- Submit financial reports, operating statistics, and vehicle data to Cherriots on a quarterly basis;
- Maintain a Title VI program and comply with Federal Title VI requirements;
- Submit to on-site inspections as requested by Cherriots;

- Comply with private sector participation requirements in Section 10 of this document; and
- Comply with all applicable state and federal requirements.

4. COORDINATION

Coordination is an ongoing process that parallels the process for STF allocations. It involves a public input process through the STFAC and the development of the Transportation Improvement Program (TIP) by the MWVCOG, and eventually the Board of Directors comprised of elected officials make final funding decisions based on input from Cherriots staff, the STF Advisory Committee, and the general public.

4.1 Public participation process

Coordination with MWVCOG staff ensures that all Section 5310 projects are listed in the TIP, which lists all federally funded transportation projects in the region. For public transportation projects, the public participation process for the TIP satisfies the public participation process and timing for the POP. All projects considered for funding must be reviewed by the STFAC, which is aware of all funding for projects serving seniors and individuals with disabilities. The STFAC uses the Coordinated Plan as a guide for the coordination of projects. This prevents the duplication of services to any target group.

The following non-profit organizations work with Cherriots on a regular basis: United Way of the Mid-Willamette Valley, the Mid-Willamette Community Action Agency, Northwest Senior and Disability Services, the Garten Foundation, Rockwest Industries, Shangri La Corporation, the tribal governments involved with the Chemawa Indian School, and Catholic Community Services.

In developing the Coordinated Plan, Cherriots integrated information from local and regional demographics and residential/employment growth trends, ridership and productivity of existing services, intra-county and inter-county commute data, land use patterns with data gathered from stakeholders through interviews, surveys, and focus groups. Stakeholder groups included the members of the TAC, drivers, dispatchers, passengers, Cherriots staff, and the staff from human services agencies whose services to clients dovetail with transit services. The parent document, known as The Specialized Transportation Plan for Polk and Marion Counties, contains three consistent themes:

1. Improved access to and availability of information, education, and outreach about the range of transportation providers and services is needed in both the urban and rural areas.
2. Enhanced coordination among the existing transit service providers, along with limited participation by human service providers, is required to enhance regional mobility.
3. Transit service improvements are needed in the urban and rural areas, primarily through enhanced frequencies and route timing corrections, but also through some restructuring of current Cherrriots Regional service. Additional funding would be required to increase frequencies of Cherrriots Regional service.

5. ELIGIBLE SUB-RECIPIENTS

Cherrriots as a designated recipient of Section 5310 funds, may allocate apportioned funds to eligible sub-recipients which are limited to:

1. A private non-profit organization; or
2. A state or local governmental authority that:
 - a. Is approved by a state to coordinate services for seniors and individuals with disabilities; or
 - b. Certifies that there are no non-profit organizations readily available in the area to provide the service (C_9070.1G, p. II-1 & II-2).

Cherrriots does not have any eligibility requirements more restrictive than the federal guidance.

The eligible sub-recipients within the Salem-Keizer UZA for traditional Section 5310 projects are:

- State, county, tribal, or local government authorities who are approved by Cherrriots to coordinate services for seniors and individuals with disabilities;
- Private non-profit organizations that provide transportation services targeted to seniors and people with disabilities and:
 - Services provided are not duplications of existing public transportation and the non-profit organization must demonstrate that the investment

- of grant funds benefits the community's overall transportation program, including meeting needs otherwise not met.
- Non-profit agency applicants must submit documentation of non-profit status when submitting an application for funding. The Oregon Secretary of State maintains a website listing all non-profit agencies with current business registrations. Cherriots checks the status of non-profit applicants prior to completing agreements and amendments, at a minimum.
 - A plan for sharing vehicles must be provided with applications for agencies providing transportation services to clients only (service is not open to the public or non-client seniors or individuals with disabilities).

5.1 Private Taxi Operators as Subrecipients

Private operators of public transportation are eligible sub-recipients. The definition of "public transportation" includes "... shared-ride surface transportation services ...". Private taxi companies that provide shared-ride taxi service to the general public on a regular basis are operators of public transportation, and therefore eligible sub-recipients. "Shared-ride" means two or more passengers in the same vehicle who are otherwise not traveling together. Similar to general public and ADA demand response service, every trip does not have to be shared-ride in order for a taxi company to be considered a shared-ride operator, but the general nature of the service must include shared rides.

6. LOCAL SHARE AND LOCAL FUNDING REQUIREMENTS

The requirements for local match of federal funds are detailed in Chapter III, item 16 of the C.9070.1G document (p. III-16 and III-17). Cherriots does not require a local funding match greater than the federal requirement. In general, a 20 percent local match is required for capital projects and a 50 percent local match is required for operating costs. The Special Transportation Fund (STF) Formula Program administered by the ODOT Rail and Public Transit Division is usually used for the local match of Section 5310 projects. STF dollars are entitlement funds appropriated by the legislature each biennium based on population, application, and administrative cost allocation. STF funds come from state cigarette, photo ID

card, and non-highway gasoline taxes, and are allocated to the agencies based on population.

7. PROJECT SELECTION CRITERIA AND METHOD OF DISTRIBUTING FUNDS

Planning for Section 5310 projects is included in the three-year Marion and Polk Counties Coordinated Public Transit – Human Services Transportation Plan (“The Coordinated Plan”). This planning process is conducted within the framework of the Salem Keizer Area Transportation Study’s (SKATS) 2015-2035 Regional Transportation System Plan, the MWVCOG Unified Planning Work Plan (UPWP), TIP, and the Cherriots Strategic Plan.

Annual program funding will use a competitive process as outlined below. Cherriots will solicit project applications from eligible sub-recipients based on a timeline that is established each year by Cherriots staff.

There are four major criteria used to select and distribute Section 5310 dollars:

1. An assessment of current transportation services
2. An assessment of transportation needs
3. Identification of strategies, activities, and/or projects to address the identified transportation needs (as well as ways to improve efficiencies)
4. Implementation of priorities based on funding, feasibility, time, etc.

Projects funded through the Section 5310 program are derived from The Coordinated Plan and meet the intent of the program. Proposed projects are brought forward through the Cherriots STFAC.

Projects selected using the four criteria defined above reflect an evaluation of program needs and the potential to match the need with projected funding, the number of constituents to be served, staffing resources, and potential coordination with other community services. The TAC, composed of members of the public and the Mid-Willamette Valley Council of Governments (MWVCOG), receives the applications and hears presentations given by applicants to make informed recommendations for proposed projects on an annual basis. The TAC recommends

a project list to the STFAC, which makes the final recommendation to the Cherriots Board of Directors, who ultimately have final authority for deciding which projects will be funded.

Applications are solicited on the Cherriots.org website, by publishing a public notice in the Statesman Journal newspaper at least 30-days before the application deadline. The public notice is also distributed by sending e-mail solicitations to known providers, and via Facebook and other social media channels. The application process is used for all projects. The outline that follows provides a step-by-step process used by the Cherriots planner who coordinates the solicitation process:

- Advertisements for applications are placed on the Cherriots.org website, by publishing a public notice in the Statesman Journal newspaper, and by sending e-mail solicitations to known providers;
- A list of every provider receiving the application solicitation is maintained;
- Should addenda be required, copies are issued to all receiving the applications
- Cherriots staff document date and time applications are received by the published closing date;
- Responses are reviewed for completeness including:
 - Required forms, etc.
 - Listing of references, qualifications, other documents
 - Original copy is identified as the document of record
- Application review by TAC composed of at least four voting members of the STFAC and three members of the public, including one representative from the MWVCOG
 - Copies of applications are provided to each TAC member, along with evaluation sheets;
 - One evaluation meeting is conducted where applicants are requested to give a short oral presentation on their proposed project and answer any questions that TAC members have;
 - Evaluation sheets are scored, recorded, and tabulated for consensus;
 - References are checked to verify projects given as samples;
 - A recommended Program of Projects (POP) is forwarded to the STFAC from the TAC;
 - The STFAC develops the final recommendation for a POP to go to the Cherriots Board of Directors for approval;

- The Cherriots Board of Directors vote on the final project recommendation from the STFAC, and the approved list is funded.
- Follow-up to provider selection:
 - Notification letter is mailed to all responders indicating approved projects;
 - Response is made to protests, should any arise, along with documented findings;
 - Board action request is written for approval of contract writing;
- Contract with approved provider is developed;
 - Signed contract is mailed with request for insurance certificates;
 - Receipt of contract with all necessary attachments;
 - Notification is mailed to proceed with timeline of contract activities.

8. ANNUAL PROGRAM OF PROJECTS

DEVELOPMENT AND APPROVAL PROCESS

Cherriots is responsible for conducting a local public process to solicit, review, and prioritize projects for funding. The review includes evaluation of applicant eligibility, project type and justification, merit, coordination efforts, public involvement, and environmental justice. Cherriots may establish other review criteria as well, such as local priorities, project planning, efficiency, and effectiveness. The Cherriots Board of Directors' review, utilizing the STFAC as a resource, assures that projects are derived from The Coordinated Plan.

The application process will be led by Cherriots staff. Each application cycle will have guidance, application forms, and specific tasks, deadlines, and meeting dates that will be identified in the materials that are distributed to eligible sub-recipients as appropriate.

1. Cherriots staff informs eligible sub-recipients of the upcoming application cycle. Along with a public notice published in the local newspaper (The Statesman Journal), the notice of availability is posted on the Cherriots website and through its chosen social media channels such as Facebook and Twitter. Cherriots non-profit organization contacts such as the United Way, Catholic Community Services, and Garten Services are also notified of the available funds when the notice is published in order to maximize feasible participation by private providers of public transportation.

2. Eligible sub-recipients notify Cherriots staff of their intention to apply;
3. Completed applications are due to Cherriots staff; staff will review applications for completeness, compliance with requirements, and applicant qualifications prior to sending to the Technical Advisory Committee (TAC); the TAC reviews the projects for qualifications and sorts them into the “traditional” or “non-traditional” categories.
4. The TAC reviews and ranks the eligible projects to determine which projects receive funding; The TAC makes a recommendation to the STFAC, and the STFAC considers its recommendation at their next meeting; the STFAC then forms a formal recommendation to the SAMTD Board of Directors; the STFAC may recommend that a project receive only part of the funding requested in an application due to limited Section 5310 Program funding available. This may result in a reduced federal share for a project, or only part of the project being implemented;
5. Cherriots staff prepares a draft Program of Projects (POP) for review by the STFAC;

The requirements for the POP include:

- The total number of sub-recipients;
 - Identification of each sub-recipient, including whether they are governmental authorities, private non-profit agencies, or Indian tribal governments or tribal transit agencies;
 - A description of each project;
 - The total project cost and the federal share;
 - Whether each project is a capital or an operating expense; and
 - Whether or not it meets the requirements for a “traditional Section 5310 capital” project.
6. The Cherriots Board of Directors considers the STFAC’s POP for Section 5310 Program funding;
 7. Upon approval, Cherriots staff notifies applicants of the Board’s approval of projects for Section 5310 Program funding; Grants Administrator submits approved POP to the Mid-Willamette Valley Council of Governments (MWVCOG) and requests an amendment to the Statewide Transportation Improvement Program (STIP), as needed;
 8. Applicants receiving Section 5310 funding work with Cherriots staff to develop project agreements;

9. Cherriots staff apply to the FTA for funding for the projects on behalf of the sub-recipients;
10. FTA approves projects submitted;
11. Cherriots writes sub-recipient agreements and works with applicants to develop scope of work, and provides technical assistance as needed for procurement of capital assets such as new vehicles.

After the MWVCOG enters the projects into the TIP, Cherriots staff will forward the POP to the FTA and works with sub-recipients to implement. A chronological summary of the application schedule process is shown in Table VII-1.

Table VII-1. Typical annual application process schedule

Date	Event Description
<i>Early December</i>	Cherriots issues the notice of funding availability, including posting applications on the Cherriots.org website
<i>Early January</i>	Application deadline
<i>Late January</i>	Applications processed by Cherriots staff and submitted to the TAC The TAC reviews applications and makes recommendation of a POP to the STFAC
<i>Early February</i>	STFAC receives the TAC’s recommended POP and makes their own recommendation to the Cherriots Board of Directors
<i>Late February</i>	Cherriots Board of Directors receives recommendation from the STFAC and makes final ruling on funding
<i>April</i>	Applications submitted in TrAMS

8.1 Appeals of project selection process

Should an applicant feel that the project selection process was unfair or inappropriate, they can submit a formal appeal of the process to the Section 5310 Program Manager at the following address:

Cherriots
c/o Section 5310 Program Manager
555 Court Street NE, Suite 5230
Salem, OR 97301

A review of the process will be completed within two weeks of the receipt of the appeal, and the applicant will be contacted with the results of the appeal.

9. ADMINISTRATION, PLANNING, AND TECHNICAL ASSISTANCE

Cherriots documents the procedures for administering the FTA-direct Section 5310 grant in this Program Management Plan. Future transportation needs will be identified through the updating process of The Coordinated Plan, which shall be updated every three years. As stated in FTA Circular 9070.1G, and in accordance with Section 6 above, Cherriots will:

1. Develop project selection criteria consistent with the coordinated planning process;
2. Notify eligible local entities of funding availability;
3. Solicit applications from potential sub-recipients;
4. Determine applicant and project eligibility;
5. Certify that allocations of funds to sub-recipients are made on a fair and equitable basis;
6. Submit an annual POP and grant application to FTA;

7. Ensure sub-recipients comply with federal requirements;
8. Certify that all projects are included in the Cherriots Coordinated Public Transit-Human Services Transportation Plan developed and approved through a process that included participation by seniors, individuals with disabilities, representatives of public, private, and nonprofit transportation and human service providers, and other members of the public;
9. Certify that to the maximum extent feasible, services funded under Section 5310 are coordinated with transportation services assisted by other federal departments and agencies;
10. Ensure that at least 55 percent of the area's apportionment is used for traditional Section 5310 projects carried out by the eligible sub-recipients as described in the "Eligible Activities" section of this PMP; and
11. Oversee project audit and closeout.

Cherriots has the option to reserve ten percent of the total Section 5310 apportioned to Cherriots to cover administrative costs of the grant. This will cover Cherriots' internal costs for administering the grant. Technical assistance is provided to sub-recipients of Section 5310 grants to ensure compliance with federal and state regulations, including Disadvantaged Business Enterprise (DBE), Equal Employment Opportunity (EEO), and Title VI provisions.

10. TRANSFER OF FUNDS

In accordance with FTA Circular 9070.1G, page III-6, #10a and 10b, funds apportioned to large urbanized areas may not be transferred to other FTA programs or to other areas of the state.

11. PRIVATE SECTOR PARTICIPATION

In order to meet the 55 percent traditional projects goal, private non-profits must be solicited for participation in the program. The other 45 percent of the program is geared towards the for-profit private sector. Along with a public notice published in the local newspaper (The Statesman Journal), the notice of availability is posted on the Cherriots website and through its chosen social media channels such as Facebook and Twitter. Cherriots non-profit organization contacts such as the United Way, Catholic Community Services, and Garten Services are also notified of the available funds when the notice is published in order to maximize feasible participation by private providers of public transportation.

Contacts at the Salem and Keizer Chambers of Commerce also post notices of funding availability. Two other channels for outreach are the Cherriots Board of Directors, who are elected officials with many contacts in local organizations, and a list of minority-based organizations such as the Latino Business Alliance.

12. CIVIL RIGHTS

Cherriots adopted its current update to its Title VI Program in June 2017 using the most recent federal guidelines. This program details how Cherriots meets federal civil rights requirements and includes the policies that prevent discrimination against populations of racial minorities, people of other national origins, and people of color. The adopted Program includes clauses that require Cherriots to monitor its sub-recipients of Section 5310 funds for Title VI compliance.

All sub-recipients must comply with Title VI regulations (as well as Equal Employment Opportunity [EEO] and Disadvantaged Business Enterprise [DBE] requirements), or risk federal funding cancellation and withdrawal. Cherriots holds regular consultations with its sub-recipients and offers technical assistance for complying with these requirements. Each contract signed between Cherriots and its sub-recipients includes provisions for compliance with the Title VI, EEO, and DBE federal laws. The details of procedures and methods for monitoring the sub-recipients are as follows:

12.1 Cherriots responsibilities

1. Obtain a signed certification of compliance from all sub-recipients each year;
2. Include non-discrimination clauses in all grant agreements;
3. Maintain a list of all 5310 funding applications and ensure those projects serving minority populations have equal opportunity for funding;
4. Ensure Cherriots project evaluation and selection processes are non-discriminatory;
5. Review all informal complaints received by Cherriots that may be a “civil rights” issue and provide technical assistance to agencies or individuals;
6. Refer information on active lawsuits or complaints to Cherriots Civil Rights Officer;
7. Review Civil Rights compliance during on-site program reviews;
8. Review Title VI compliance during on-site program reviews; and
9. Notify the public of Cherriots commitment to providing non-discriminatory programs, and inform the public how to find more information and file a discrimination complaint.

12.2 Subrecipient responsibilities

1. Provide annual Title VI assurances. First time applicants, in addition to assurances, shall provide information regarding their Title VI compliance history if they have previously received funding from another federal agency.
2. Develop a Title VI complaint form and procedures;
3. Record and report Title VI investigations, complaints, and lawsuits. Report to Cherriots a concise description of active lawsuits or complaints alleging discrimination in service delivery in the past three years. The report must disclose the status or outcome of lawsuits or complaints, and summarize all civil rights compliance review activities conducted during the three-year period.
4. Provide meaningful access to Limited English Proficiency (LEP) Persons;
5. Provide information to the public. Post information on the website, buses, brochures, etc.
6. Provide additional information upon request;
7. Prepare and submit a Title VI Program/Report to Cherriots. Submit general information to determine compliance with Title VI. Submission shall include:
 - a. A summary of public outreach and involvement activities and the steps taken to ensure minority and low-income people had meaningful access to these activities;

- b. A copy of the agency’s plan for providing language assistance for persons with limited English proficiency;
 - c. A copy of the agency’s procedures for tracking and investigating Title VI complaints;
 - d. A list of Title VI investigations, complaints, or lawsuits filed with the agency since the last submission. The list should include only those that pertain to public transportation; and
 - e. A copy of the agency’s notice to the public that it complies with Title VI and instructions to the public on how to file a complaint.
8. Integrate environmental justice analysis; and
 9. Seek out and consider viewpoints of minority, low-income, and LEP populations.

Civil Rights assurances are submitted to FTA with every application of Section 5310 funds. Civil Rights assurances extend to the sub-recipient’s entire facility and services. Sub-recipients are required to keep a record of all complaints and are required to report to Cherrriots any formal (written) complaints of discrimination in the provision of transportation-related services or benefits.

12.3 Environmental justice

Agencies receiving federal grant funds are required to assure nondiscrimination under Title VI of the Civil Rights and other related laws. Environmental justice specifically addresses minority and low income populations: a 1994 Presidential Executive Order directed every federal agency to make environmental justice part of its mission by identifying and addressing the effects of all programs, policies, and activities on “minority populations and low-income populations.”

Sub-recipients support Title VI and environmental justice when they:

1. Assure new investments and changes in transit facilities, services, maintenance, and vehicle replacement deliver equitable levels of service and benefits to minority and low-income populations.
2. Avoid, minimize, or mitigate disproportionately high and adverse effects on minority and low-income populations.
3. Assure that public involvement activities identify and involve minority and low-income populations when making transportation decisions.
4. Engage in planning related to development of transit services and capital purchases, they are expected to include consideration of “environmental justice.”

Cherriots responsibilities

Provide technical assistance to help subrecipients with outreach to minority and low income populations.

Sub-recipient responsibilities

Consider transportation needs of minority and low-income populations, as well as others, in all planning processes, including mobility issues, access to jobs and services, level of service and service equity.

12.4 Disadvantaged Business Enterprise program

As a recipient of FTA funds, Cherriots is required to implement a program that provides the maximum opportunity for Disadvantaged Business Enterprises (DBEs) to compete for contracts financed by federal funds. It is the policy and intent of Cherriots to practice nondiscrimination and to create a level playing field on which DBEs can compete fairly for contracts. The DBE program affects all of Cherriots federally funded projects. Regulations are found at 49 CFR, Parts 23 and 26.

Cherriots roles and responsibilities

1. Assure that provisions of the DBE Program are adhered to by Cherriots, FTA grant sub-recipients and contractors; and initiate and maintain efforts to increase DBE Program participation by disadvantaged businesses;
2. Include DBE requirements in all grant agreements;
3. Assist sub-recipients to obtain information on DBE businesses in their geographic areas; and
4. Require sub-recipients to submit semiannual DBE reports on capital, materials and supplies, and professional services expenses and quarterly ARRA DBE reports on the same.

12.5 Equal Employment Opportunity

Cherriots is responsible both for its own compliance and for ensuring that local sub-recipients are in compliance with the Equal Employment Opportunity Act (EEO). The threshold for compliance is receipt in the previous fiscal year of \$1 million or more in FTA assistance, and 50 or more mass transit-related employees. Cherriots has an EEO plan covering its employees.

In addition, Cherriots may require documentation from any sub-recipient as it

deems necessary to assure that there is no discrimination on the basis of race, color, creed, national origin, sex, age, or disability. Reference is found at FTA C 9070.1.G. Cherrlots will post EEO information in a place readily accessible by employees, will include an EEO statement in all job advertisements, and will review EEO practices by sub-recipients during on-site reviews.

13. SECTION 504 AND ADA REPORTING

Section 504 of the Rehabilitation Act of 1973 preceded the Americans with Disabilities Act (ADA). Section 504 prohibits discrimination on the basis of handicap by recipients of federal financial assistance. US DOT's Section 504 regulations remain in effect. The USDOT issued regulations to implement the ADA effective January 26, 1992.

The ADA is a civil rights law enacted by the U.S. Congress in 1990. The FTA enacted regulations in support of the ADA that define the delivery of transportation services. The regulations require specific actions on the part of transit providers. The FTA regulations are found in the U.S. Department of Transportation 49 CFR Parts 27, 37 and 38: Transportation for Individuals with Disabilities; Final Rule, Friday September 6, 1991. These regulations apply to all providers of public or private transportation services whether or not they receive state or federal funding assistance. These rules are available on the Federal Transit Administration's website: <https://www.transit.dot.gov/regulations-and-guidance/civil-rights-ada/civil-rightsada>

As a condition for receiving grant funding, sub-recipients must demonstrate compliance with the ADA and the FTA's implementing regulations. Agencies will demonstrate compliance through their day-to-day operating procedures, their planning and management of transit services, public involvement and information, vehicle procurement, and other activities.

Each transit agency will have written policies and procedures designed to meet the requirements. For example, the vehicle maintenance policy will include maintenance of the ADA-accessible features (the lift, etc.); the employee-training plan will include ADA topics. If the agency contracts out any or all of the service, the agency must be knowledgeable about how the contractor maintains compliance. ADA compliance is not a one-time effort and compliance must be consistently

maintained by the agency over time. New employees or changing services are not an excuse for lack of compliance.

Cherriots staff will routinely evaluate each sub-recipient program for compliance to the ADA. Oversight will include site reviews, desk audits, review of policies and procedures, information from substantive complaints, and other means. Cherriots will also provide technical assistance upon request.

13.1 Summary of ADA requirements

The regulation is divided into compliance areas primarily associated with the following terms: public, private, fixed-route, and demand-responsive. There are other related terms. Review the definitions at 49 CFR Part 37 subpart A §37.3.

1. Public means any state or local government, and any department, agency, special purpose district, or other instrumentality of one or more state or local governments;
2. Private means any entity other than a public entity;
3. Fixed-route system means a system of transporting individuals on which a vehicle is operated along a prescribed route according to a fixed schedule;
4. Demand-responsive system means a system of transporting individuals that is not a fixed route.

Compliance to the ADA requires that sub-recipients comply with “stand-in-the-shoes” relationships. Generally, stand-in-the-shoes means that the sub-recipient must follow the same regulations as the contracting agency. For example, if a private entity is operating under contract to a public entity, then a stand-in-the-shoes relationship exists and the contracted service must conform to those required of a public entity. There are instances where a public entity receives funds on behalf of a private non-profit entity. When the public entity on its own would not operate the transit service, and the service design, implementation, and management is entirely the responsibility of the other entity, then the relationship between the two is defined as “pass-through” and the stand-in-the shoes definition does not apply. Cherriots staff must be knowledgeable and in agreement with how roles and responsibilities are defined.

14. PROGRAM MEASURES

Cherriots requires its sub-recipients to collect and report data described in Chapters II and VI of FTA Circular C_9070.1G. Reports are submitted quarterly with their claims for reimbursement and staff provides copies at the STFAC meetings. If any questions arise, they can be handled promptly and with the least amount of disturbance to the services provided. Cherriots staff reports sub-recipients' data such as ridership and mileage to the FTA on a quarterly basis in accordance to the FTA's reporting requirements. Typically, sub-recipient ridership and mileage data is reported by Cherriots staff to the National Transit Database (NTD) every quarter.

14.1 Quarterly reports

- Quarterly reports are due to Cherriots ten business days following the end of each quarterly period: Jan. 1 through March 31, April 1 through June 30, July 1 through Sept. 30, and Oct. 1 through Dec. 31. Data requested could include the following items, but would be listed on the report form. These reports must be submitted to Cherriots on a quarterly basis for each vehicle, transportation program, or other service funded through the Salem-Keizer Urbanized Area's Section 5310 Program:
- A narrative describing accomplishments and/or problems and changes to milestones and budgets;
- A copy of all recorded civil rights or Title VI complaints;
- The actual or estimated number of one-way unlinked passenger trips (if applicable), and the categorical purpose of each trip (if known, optional);
- The actual or estimated statistics related to delivering mobility management, local bus service orientation, client eligibility, or similar services; such as contacts through call centers, website visits, and training sessions;
- Physical improvements completed (such as sidewalks, transportation facilities, or technology);
- Quarterly revenues and sources of revenue for the project;
- Quarterly capital and operating costs (separated);
- Quarterly actual or estimated vehicle revenue miles (required) and hours (if

known);

- Fleet summary including year, mileage, make/model, and relevant features; and
- Inventory of related facilities.

14.2 Annual reports

Cherriots will submit required annual Section 5310 reports to the FTA by Oct. 31 of each year, covering a 12-month period ending on Sept. 30. Cherriots will be responsible for consolidating this data from monthly reports and may request additional information from sub-recipients.

14.3 National Transit Database (NTD) reporting

Sub-recipients must provide Cherriots with information necessary for Cherriots to file annual NTD reports, if and when applicable. The necessary information, which commonly includes vehicle miles and hours, passenger trips, and financial information, will vary depending on the project and sub-recipients must coordinate with Cherriots to determine what is necessary. NTD information is due to Cherriots by March 15 annually.

Cherriots will use these reports to monitor sub-recipient fiscal and operational management and to satisfy federal reporting requirements. Cherriots will schedule on-site visits with sub-recipients on an annual cycle to review operations and maintenance records. In addition, to improve sub-recipient monitoring procedures, Cherriots staff may request and review supporting documentation, including local match documentation, for one sub-recipient's reimbursement request per quarter. Selection of the reimbursement request will be based on either a risk assessment or random selection.

14.4 Performance measures

Consistent with federal guidelines and as incorporated in the sub-recipient agreement, sub-recipients will be asked to show (as applicable) all increased activity due to the grant funded project, such as:

- Actual annual number of rides (as measured by one-way trips) as a result of the implementation of 5310 program; and
- Annual increases or enhancements related to geographic coverage, service quality and/or service times that impact the availability of transportation

services for individuals with disabilities.

The sub-recipients will also work jointly with Cherriots to establish other performance indicators that are more specific to their projects to measure relevant outputs, service levels, and outcomes. Sub-recipients will be required to report these performance measures on a quarterly basis as required by Cherriots and the FTA.

15. PROGRAM MANAGEMENT

Cherriots complies with the Federal Office of Management of Budget (OMB) regulations for the management and oversight of federal grant funds. These requirements are defined by the various OMB circulars. The requirements for the FTA further define the requirements as defined by 49 USC 53, and are detailed by the program circulars. A complete list of program references and requirements is found in each of the FTA circulars. A few of the relevant references are:

- 2 CFR 200;
- 49 USC Chapter 53: <https://www.transit.dot.gov/regulations-and-guidance/legislation/chapter-53-amended-fast-act>
- FTA grant circulars: <https://www.transit.dot.gov/regulations-and-guidance/fta-circulars/final-circulars>
- FTA circular 5010.1D (grant management): <https://www.transit.dot.gov/regulations-and-guidance/fta-circulars/grant-management-requirements>
- FTA C 4220.1F (procurement): <https://www.transit.dot.gov/regulations-and-guidance/fta-circulars/third-party-contracting-guidance>

Program management responsibilities, processes, and procedures, including procurement, financial management, property management, vehicle use, maintenance and disposition, accounting systems, audit, and closeout are documented in Cherriots finance policies and administrative manuals. Furthermore, Cherriots follows and complies with the ODOT State Management Plan on all of the aforementioned topics. Procedures for management of financial

reviews and project monitoring can also be found in the Cherriots finance policies and administrative manuals.

15.1 Management of sub-recipients

The activities described below are part of the oversight and project management activities necessary to ensure that projects funded with 5310 funds are implemented in accordance to FTA 5310 Program guidelines and funding agreements. Cherriots responsibilities are outlined below:

15.1.1. Monitoring and reporting

- Monitor expenses and reimbursements to sub-recipients to ensure compliance with the federal grant award and the sub-recipient agreement;
- Work with Cherriots Finance Department to include project-related information in Cherriots financial system, such as project grant number, amount, and funding sources. This information is needed for accounting and monitoring of project funding and expenses.
- Review sub-recipient invoices for accuracy, ensure that the required documentation is on file and payments are made as approved;

15.1.2. Procurements including debarment and suspension

- Compile and distribute FTA procurement guidelines to all sub-recipients;
- Work with all sub-recipients to analyze, evaluate, and answer any particular procurement questions they may have relevant to their project(s);

15.1.3. Financial management including FTA electronic grant management system

- Prepare quarterly status progress reports and financial reports and report to the FTA's Transit Award Management System (TrAMS);
- Analyze monthly or quarterly project expenses and reimbursements from the FTA and reconcile with the FTA's TrAMS system for accuracy;

15.1.4. Property management and vehicle use

- Monitor, through yearly site visits, project implementation activities and ensure compliance with federal and contractual requirements;

- Analyze project activities and determine if any changes to the budget, scope, or schedule are required;

15.1.5. Agreements, accounting system, closeout, and audits

- Accordingly, initiate and prepare any needed grant and sub-recipient agreement amendments prior to requesting FTA's approval to grant revisions;
- Prepare and file grant budget revisions;
- Evaluate, prepare, and file grant and sub-recipient agreement closeout documents; and
- Work with sub-recipients to set performance measures throughout the life of the project to track its effectiveness and progress, as described in the Performance Measures section below and in the sub-recipient agreement.

As part of the oversight and project management activities, each project will be assigned an agreement number that will be linked to the FTA grant funding the project.

16. OTHER PROVISIONS

Cherriots complies with other federal requirements such as environmental protection, Buy America provisions, pre-award and post-delivery reviews, restrictions on lobbying, prohibition of exclusive school bus transportation, and drug and alcohol testing, including the state's procedures for monitoring compliance by sub-recipients. Moreover, sub-recipients of Section 5310 funds will be monitored by Cherriots staff for compliance in all of the above-mentioned areas. The following describes Cherriots and sub-recipients' responsibilities for complying with each provision:

16.1 Environmental protection

The FTA's environmental protection process is based on compliance with the National Environmental Policy Act (NEPA) and rules adopted by the FTA to comply with NEPA in transportation-related projects. The FTA's regulation requires different levels of analysis and documentation for the various types of funding.

Most projects funded with federal funding are excluded from FTA environmental regulations because they fall into the “categorical exclusion” definition. The FTA classifies two groups of projects which are “categorically excluded”:

The first are activities and projects which have very limited or no environmental effects, such as planning, design, administration and operation of transit programs, and vehicle purchases. For these activities, no environmental documentation is required and sub-recipients do not have to fill out a Documented Categorical Worksheet (DCE) form.

The second group includes construction projects with potential for environmental impacts: passenger shelters, bus yard, new construction or expansion of transit service facilities, offices, and parking facilities.

The FTA determines whether projects meet the requirements for a categorical exclusion.

Cherriots responsibilities

1. Review projects to determine those that must have DCE approval, ensure the required documents are provided, and submit the DCE packet to the FTA on behalf of the sub-recipient;
2. Provide technical assistance as needed to help sub-recipients prepare the required DCE information for the FTA; and
3. Assure a DCE approval for a project has been obtained from the FTA prior to finalizing a grant agreement.

Sub-recipient responsibilities for categorical exclusions

When a sub-recipient’s project requires FTA approval, in category ‘b’ above, these are the steps required to obtain a DCE for the project:

1. Review the “ODOT Rail & Public Transit Shelters and Facilities Projects: Required Documentation for Federally Funded Facilities Grants (Structures)” found at:
<https://www.oregon.gov/ODOT/RPTD/RPTD%20Document%20Library/shelter-facility-projects.pdf>
2. Fill out a Documented Categorical Exclusion form. Access the DCE worksheet from FTA Region 10’s website at: <https://www.transit.dot.gov/about/regional->

[offices/region-10/fta-region-10-categorical-exclusion-and-documented-categorical](#)

and submit the form with appropriate attachments to Cherrlots for processing; and

3. Do not start work on a construction project until approval of the DCE for the project has been obtained from the FTA. Ensure a copy is forwarded to Cherrlots, and that the signed grant agreement with Cherrlots has been received.

16.2 Buy America provisions, pre-award/post-delivery certifications, and new model bus testing

Buy America provisions are federal “domestic content” regulations. Buy America affects vehicle and equipment purchases and construction contracts valued at \$100,000 or more. It provides, with exceptions, that federal funds may not be obligated for transportation projects unless the steel and manufactured products used in them are produced in the United States. The FTA makes exceptions to the Buy America requirement in four situations (see references: 49 CFR Part 661; 49 CFR Part 663).

The FTA reviews requests for waiver of the Buy America requirements on a case-by-case basis. If a waiver is required, the appropriate time for a sub-recipient to seek FTA approval is after bids have been accepted, but before the bid has been awarded. Cherrlots will receive requests for Buy America waivers and forward them to the FTA.

Requirements in effect as of October 24, 1991 assure that all vehicles meet the Buy America requirements, Federal Motor Vehicle Safety Standards (FMVSS) and the sub-recipient's specifications.

Pre-award and post-delivery certifications

Procurements for vehicles must be in accordance with “Pre-Award and Post-Delivery Audits of Rolling Stock Purchases” (49 CFR Part 633; Federal Register March 31, 1992). The rule requires that any sub-recipient who purchases rolling stock certify to the FTA that it has conducted a pre-award and post-delivery audit to assure compliance with its bid specifications, Buy America requirements, and Federal Motor Vehicle Safety Standards. Visual inspection and road testing are required when purchasing unmodified vans, cars, or 20 or fewer buses. Resident

inspection is required when purchasing more than 20 buses or modified vans from a single manufacturer.

16.2.1. New model bus testing

New bus models must be tested at the FTA-sponsored test facility in Altoona, PA before FTA funds can be expended to purchase them. The FTA rule exempts certain vehicles from testing (usually sedans and vans). The primary purpose of the testing program is to determine the strengths and weaknesses inherent in the particular model for typical operating conditions. Ideally, sub-recipients use the bus-testing report as one of the criteria used to select the vehicle for purchase.

Sub-recipients purchasing equipment with federal funds are currently required to receive the Altoona/STURAA bus test report for each vehicle model purchased and include it in procurement files when the test is required. The report should be provided by the vendor prior to sub-recipients signing off on post-delivery certification forms and acceptance of the vehicle(s) from the vendor.

Cherriots responsibilities

1. Include Buy America, pre-award and post-delivery certifications, and New Model Testing requirements in applicable grant agreements;
2. Review requests for waivers to Buy America requirements and forward them to the FTA;
3. Review agency procedures regarding Buy America, pre-and post-delivery certifications, and bus testing requirements during on-site program reviews; and
4. Review and approve all documentation and certifications provided by the sub-recipients prior to making reimbursements on grant agreements.

Sub-recipient responsibilities

1. Review the manufacturer's Buy America certification and supporting documentation before a contract is awarded to purchase vehicles (pre-award audit). The documentation review should include vehicle sub-components (place of origin, cost, and place of final assembly). Sub-recipients must determine to their own satisfaction that the manufacturer can meet the Buy America requirements.
 - a. Perform a post-delivery audit after vehicles have been delivered. This post-delivery audit assures that the manufacturer complied with Buy America, the Federal Motor Vehicle Safety Standards, and the sub-

- recipient's specifications. Sub-recipients must complete the post-delivery audits before they accept the vehicles and pay the vendor.
- b. Submit all documentation and certifications to Cherriots.
Documentation must be received by Cherriots prior to final payment to the sub-recipient.
 - c. Contact Cherriots for technical assistance if needed.

16.3 Lobbying

Recipients and sub-recipients of federal grants from any source exceeding \$100,000 annually must certify that they have not and will not use federally appropriated funds for lobbying. State agencies administering federal programs certify to the FTA; sub-recipients certify to the state. State agencies and sub-recipients must impose lobbying restrictions on their third-party contractors and must obtain certifications. The regulations are found in 31 U.S.C. 1352 and 49 CFR Part 20.

Contracts, grants, and cooperative agreements are actions covered by the restrictions on lobbying. For example, activities such as submitting grant applications, status inquiries, and professional and technical services are not lobbying and do not need to be disclosed. Efforts to influence federal officials about specific grants and contracts or to ask congressional representatives for support of a particular application must be disclosed. Lobbying restrictions do not apply to activities that might influence policy issues.

Cherriots responsibilities

1. Assure that sub-recipients have signed current year annual certification and assurances and have documentation on file pertaining to lobbying activities as required by 49 CFR Part 20;
2. For each quarter that Cherriots conducts a lobbying activity, complete Standard Form-LLL found at: <https://www.gsa.gov/forms-library/disclosure-lobbying-activities> -- (Oregon state law prohibits use of state funds for lobbying. Cherriots does not participate in lobbying activity. Cherriots would submit Standard Form-LLL if for some reason this activity became part of approved work.);
3. Obtain Standard Form-LLL from any sub-recipient and/or its subcontractor(s) who used non-federal funds to support lobbying;
4. Send forms within 30 days of the calendar quarter in which the activities

were conducted to ODOT Governmental Affairs office, who prepares the quarterly reports to the FTA; and

5. Assure ODOT Governmental Affairs submits Standard Form-LLL to the FTA, as required.

Sub-recipient responsibilities

1. Sign annual certification of compliance pertaining to lobbying activities;
2. Where third party contractors are involved, sub-recipients must obtain a signed certification of compliance from the contractor;
3. For each calendar quarter that non-federal funds have been used to support lobbying activities in connection with a grant from Cherriots, and the sub-recipient receives federal grants exceeding \$100,000, fill out a Standard Form-LLL and submit the form within 30 days of the end of the quarter to Cherriots; and
4. If contractors received more than \$100,000 in federal funds and used non-federal funds to support lobbying, sub-recipients must obtain the completed Standard Form-LLL from the contractor and submit it to Cherriots within 30 days of the quarter in which the lobbying activity was conducted.

16.4 Prohibition of exclusive school transportation

Section 5310 sub-recipients are prohibited from providing exclusive school bus service unless the service qualifies and is approved by the FTA Administrator under an allowable exemption. Federally-funded equipment or facilities may never be used to provide exclusive school bus service. Head Start transportation is considered human service transportation and not school bus service. Regulations are found in 49 CFR Part 605; 49 USC 5323 (f).

Sub-recipients are encouraged to identify ways to coordinate with schools. Sub-recipients may carry children to school as part of a public transportation program, including services provided before and after school, if provided as part of regularly scheduled service open to the general public and when the service is identified in the published schedule. Such services are commonly called "Tripper Services."

Cherriots does not allow subscription programs for carrying school children on general public systems, if by doing so the general public is excluded.

Cherriots responsibilities

1. Obtain certifications of compliance from all sub-recipients;
2. Review service descriptions in applications for funding;
3. Review service delivery during on-site reviews to assess compliance; and
4. Provide technical assistance as needed to sub-recipients.

Sub-recipient responsibilities

1. Sign a certification of compliance pertaining to School Bus regulations;
2. Report on tripper services as requested by Cherriots staff;
3. Redesign service if required to meet the definition of “tripper service;” and
4. Read and understand the School Bus regulations if exploring opportunities to share vehicles and resources in local communities.

16.5 Drug and alcohol testing regulations

In accordance to FTA Circular C_9070.1G, sub-recipients that receive only Section 5310 program assistance are not subject to FTA’s drug and alcohol testing rules, but must comply with the Federal Motor Carrier Safety Administration (FMCSA) rule for all employees who hold commercial driver’s licenses (49 CFR part 382). Section 5310 recipients and sub-recipients that also receive funding under one of the covered FTA programs (Section 5307, 5309, or 5311) should include any employees funded under Section 5310 projects in their testing program.

“Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations,” 49 CFR Part 655, revised by the FTA August, 2002, implement the omnibus USDOT drug and alcohol testing act. This part and 49 CFR Part 40, “Procedures for Transportation Workplace Drug and Alcohol Testing Programs” describes policy development and testing procedures required of any agency in receipt of FTA funds.

Sub-recipients affected by this requirement are expected to establish and manage an ongoing drug and alcohol testing program in compliance with the regulations. They must submit a current drug and alcohol policy and any changes or updates to the policy. They must also submit Management Information System (MIS) forms annually to FTA.

Cherriots responsibilities

1. Conduct review of program policies and procedures periodically, including during site reviews;
2. Provide regular drug and alcohol testing training for sub-recipients and others who have a role in implementing the program; and
3. Provide MIS reporting information to sub-recipients as necessary; assure sub-recipients submit annual MIS reporting data as required.

Sub-recipient responsibilities

1. Develop an anti-drug use and alcohol abuse policy statement and program in accordance with FTA regulations, "Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations," 49 CFR Part 655, and require sub-recipients to develop a program;
2. Assure that agreements include the requirement as appropriate to the purpose of the work;
3. Sign a certification of compliance to drug and alcohol programs, "Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations," 49 CFR Part 655, and testing for the year of funding;
4. Send policy to Cherriots upon request; and
5. Submit MIS data for the previous year (Jan. 1 to Dec. 31) by the deadline specified by Cherriots each year. This is typically at the end of February.

APPENDICES

Appendix A: Sample Public Notice

Appendix B: Sample Web Article

Appendix C: Sample Grant Application: 5310(FTA)

Appendix D: Sample Application Instructions: 5310(FTA)

Appendix A: Sample Public Notice

[SAMPLE] PUBLIC NOTICE

FUNDS AVAILABLE FOR TRANSPORTATION PROJECTS SERVING SENIORS AND INDIVIDUALS WITH DISABILITIES

The Federal Transit Administration will be announcing the availability of federal fiscal year 2018 Section 5310 Formula funds (estimated at \$232,898) this year. 5310 funds can be used for public transportation projects serving seniors and individuals with disabilities (Section 5310) within the Salem-Keizer urban growth boundary. Matching local funds are required for this grant. The match ratio is dependent on the type of project proposed.

Salem Area Mass Transit District (SAMTD) is a designated recipient of federal Section 5310 funds for the Salem-Keizer urban area, and is responsible for soliciting for projects on an annual basis. During two public meetings, a Technical Advisory Committee (TAC) will review and rank applications for 5310 dollars, and the Special Transportation Fund Advisory Committee (STFAC) will review grant proposals and make a project priority ranking recommendation to the SAMTD Board. There will be time for public testimony at the TAC and STFAC meetings. Full details of the process including applications, instructions, and dates/times of the public meetings will be available at cherriots.org/grants beginning January 23, 2018.

Grant awards for these projects are eligible for reimbursement through June 30, 2019. One eligibility requirement is that projects must be listed in the Cherriots "Coordinated Public Transit – Human Services Transportation Plan" dated August, 2016. Please refer to the corresponding grant application instructions for all of the eligibility requirements for organizations and projects.

A grant training session will be held to assist in the application process on Monday, February 5, 2018, 3:00-4:30pm at the Cherriots Administration Office, 555 Court St NE, Suite 5230, Salem, OR 97301. New applicants are encouraged to attend.

Any organization interested in submitting a proposal should contact Ted Stonecliffe, SAMTD, 555 Court St NE, Suite 5230, Salem, OR 97301, phone 503-588-2424, e-mail ted.stonecliffe@cherriots.org for details. Applications must be received by 12:00 noon, March 19, 2018 to be considered.

Si desea una copia de este aviso público en español, por favor visite el sitio web a partir del 23 de enero 2018 (<http://cherriots.org/grants>) o por teléfono: 503-588-2424.

Appendix B: Sample Web Article

Now Accepting Applications to Fund Projects that Serve Older Adults and People with Disabilities

Cherriots is now accepting applications for **transportation projects that are open to the public, and serve older adults and people with disabilities** within the Salem-Keizer urban growth boundary. Funding comes from the federal Section 5310 grant program. Cherriots is a designated recipient of these funds and is also the agency which distributes the funds.

Eligible applicants include:

- Private non-profits with managerial and financial capabilities to provide transportation services
- A state, county, tribal, or local government agency that:
 - Is approved by the State of Oregon to coordinate services for seniors and individuals with disabilities; or
 - Certifies that there are no non-profit organizations readily available in the area to provide the service (C_9070.1G, p. II-1 & II-2).

Eligible projects include:

- Capital expenses for transportation projects that are planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities
- Projects that will improve mobility for seniors and people with disabilities, including:
 - Rides for wellness and access to travel information
 - Capital purchases, such as vehicles, passenger shelters and equipment
 - Operational and administrative costs
 - Vehicle and facility preventative maintenance
 - Mobility management
 - Travel information
 - Planning
- New systems for improving access to transportation (for example, travel training, marketing, centralized call centers)
- All projects must be listed in the [Coordinated Public Transit – Human Services Transportation Plan](#) (“The Coordinated Plan”) dated August, 2016.

Project Selection Criteria:

- Priority is given to projects that match the goals and objectives listed in The Coordinated Plan.
- Projects must be cost effective and coordinate services between transportation providers to avoid providing duplicate service.
- Each project submitted to Cherriots will be reviewed for value to the Salem-Keizer urbanized area.

Further Details:

Public testimony about projects will be accepted at the Cherriots STF Advisory Committee meetings. Applicants can contact Ted Stonecliffe, Cherriots Transit Planner II, at 503-588-2424 or ted.stonecliffe@cherriots.org for application assistance.

Funds are limited, and a local match may be required to qualify for funding. Please see the individual grant application instructions for timelines of the grant funding.

A grant training session will be held to assist in the application process on February 6, 2018, 3:00 to 4:30 p.m. at the Cherriots Administration Office, 555 Court St NE, Suite 5230, Salem, OR 97301. New applicants are encouraged to attend.

The application deadline is 12 p.m. Monday, March 19, 2018. Applications will be reviewed and ranked by the Cherriots Technical Advisory Committee on Tuesday, April 3, 2018. This meeting is open to the public and will be held at 555 Court St NE, Suite 5230, Mill Creek Conference Room, Salem OR 97301. This committee will provide final recommendations to the Cherriots Board of Directors. The final decision will be made at the Thursday, April 26, 2018 board meeting.

Funding for these projects comes from the [federal Section 5310 grant program](#).

[Download 5310\(FTA\) Grant Application](#)

[Download 5310 \(FTA\) Grant Application Instructions](#)

**2018 Section 5310(FTA)
Grant Application
for Projects Located Within the
Salem-Keizer Urban Growth Boundary**



INTRODUCTION

- Read the *2018 Section 5310(FTA) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

Submittal Checklist

Make sure

- ✓ Application is complete, signed, and dated

Submit

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

A. ORGANIZATION INFORMATION

Name of Organization:

Contact Person:

Address:

Telephone:

Email:

Type of Organization (check one)

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

Area of service (check one)

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

Organization Days and Hours of Operation

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

Total transportation program costs by year

FFY17 (historical data, if applicable)	FFY18 (projected, if applicable)	FFY19
\$	\$	\$

B. PROJECT INFORMATION

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

--

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

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

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

Total Section 5310(FTA) funds requested

\$

Start date

--

Funding request type (check one)

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

Scalable Section 5310(FTA) Grant Request

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

Scalability Description:

	FFY19
Scaled request:	\$

Identify the project’s additional sources of funding in the table below

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2018 Section 5310(FTA) Grant Request (<i>Important!</i>)	\$
Local Resources	\$
Federal Resources	\$
Other (provide description):	\$
Project Grand Total	\$

Coordinated Plan

Is project derived from the Cherriots *Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016? Yes No If yes,

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

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

1. Project Description

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

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

b.) Will you coordinate between providers to avoid duplication?

Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words

c.) Is your project cost-effective?

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

d.) Project Quality

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

e.) Expected Outcomes

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

2. Provide the timeline of the project in the following table

	Step Description	Completion Date
1		
2		
3		
4		
5		
6		

3. Is your application for a replacement vehicle?

- Yes (continue to #4) No (continue to Section C)

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

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

***Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

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

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

C. ORGANIZATIONAL CERTIFICATION

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

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

Signature of Authorized Organization Officer

Title

Date

Private Nonprofit Agency - Corporation Status Inquiry and Certification

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

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

Private Non-profits

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

Certifying Representative

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

**Appendix D: Sample Application Instructions:
5310(FTA)**

**2018 SECTION 5310 (FTA)
GRANT APPLICATION
INSTRUCTIONS**

***Section 5310(FTA) Grant Program for Projects Located Within the
Salem-Keizer Urban Growth Boundary: “Enhanced Mobility of
Seniors and Individuals with Disabilities”***



2017 Section 5310(FTA) Grant Application Instructions for Projects Located Within the Salem-Keizer Urban Growth Boundary

Introduction

Title 49 USC 5310 authorizes the formula assistance program for the Enhanced Mobility of Seniors and Individuals with Disabilities Program and provides formula funds to designated recipients to improve mobility for seniors and individuals with disabilities.

Cherriots is the designated recipient for the Salem-Keizer urbanized area and will receive \$232,898 (estimated) in Section FFY2019 5310 funds for projects to be funded beginning July 1, 2018. These funds may only be used for projects within the Salem-Keizer Urban Growth Boundary (UGB).

This program provides funds to:

- (1) Serve the special needs of populations who do not have access to a personal vehicle beyond traditional public transportation service, where public transportation is insufficient, inappropriate, or unavailable;
- (2) Projects that exceed the requirements of the Americans with Disabilities Act (ADA);
- (3) Projects that improve access to fixed route service and decrease reliance on complementary paratransit (Cherriots LIFT); and
- (4) Projects that are alternatives to public transportation.

A discretionary selection process will be followed as outlined in the *SAMTD Program Management Plan for the Salem-Keizer Urbanized Area's Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program*. Please see this link for the document: http://cherriots.org/sites/default/files/5310%20PMPapproved_1.pdf

Eligible Expenses

Section 5310 funding requires at least 55 percent of the funding apportionment must be:

- Used for capital expenses for public transportation projects that are planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities (i.e. traditional Section 5310 capital projects).
- Projects must directly serve and have a specific benefit to seniors and individuals with disabilities.
- Mobility management expenses, previously eligible under Section 5317, are eligible and qualify for this traditional Section 5310 project requirement.

The remaining 45 percent of the funds may be used for operating or capital expenses associated with:

2017 Section 5310(FTA) Grant Application Instructions for Projects Located Within the Salem-Keizer Urban Growth Boundary

- Public transportation projects (capital and operating) that exceed the requirements of the ADA
- Public transportation projects that improve access to fixed route transit service and decrease reliance by individuals with disabilities on complementary paratransit (Cherriots LIFT service)
- Alternatives to public transportation that assist seniors and individuals with disabilities

Eligible Activities (*refer to the Program Management Plan for a complete list of eligible projects*):

- Projects that will improve mobility for seniors and people with disabilities, including:
 - Rides for wellness and access to travel information
 - Capital purchases, such as vehicles, passenger shelters and equipment
 - Operational and administrative costs
 - Vehicle and facility preventative maintenance
 - Mobility management
 - Travel information
 - Planning
 - New systems for improving access to transportation (for example, travel training, marketing, centralized call centers)

Eligible Applicants

Section 5310 funds are limited to the following eligible subrecipients:

- a. A private non-profit organization; or
- b. State, county, tribal, or local government agency that:
 - Is approved by the State of Oregon to coordinate services for seniors and individuals with disabilities; or
 - Certifies that there are no non-profit organizations readily available in the area to provide the service (C_9070.1G, p. II-1 & II-2).

The eligible subrecipients within the Salem-Keizer UGB for traditional Section 5310 projects are:

- State, County, tribal, or local government authorities who are approved by Cherriots to coordinate services for seniors and individuals with disabilities;
- Private non-profit organizations that provide transportation services targeted to seniors and people with disabilities and:

2017 Section 5310(FTA) Grant Application Instructions for Projects Located Within the Salem-Keizer Urban Growth Boundary

- Services provided are not duplications of existing public transportation and the non-profit organization must demonstrate that the investment of grant funds benefits the community's overall transportation program, including meeting needs otherwise not met.
- Non-profit agency applicants must submit documentation of non-profit status when submitting an application for funding. The Oregon Secretary of State maintains a website listing all non-profit agencies with current business registrations. Cherriots checks the status of non-profit applicants prior to completing agreements and amendments, at a minimum.
- A plan for sharing vehicles must be provided with applications for agencies providing transportation services to clients only (service is not open to the public or non-client seniors or individuals with disabilities).

Special Note for Non-profit Agencies

If your agency is a private non-profit organization that has not applied for a recent Section 5310 grant, please provide the following agency information (see Appendix for more information):

- Articles of Incorporation
- Adopted Corporate Bylaws
- 501(c)3 non-profit approval letter from the Internal Revenue Service
- A description of transportation services and other grants received by your agency

Private non-profit agencies (for both new and returning applicants) must be registered with the Oregon Secretary of State Corporation Division (<http://www.filinginoregon.com/business/index.htm>) to do business in Oregon.

Coordination Requirements

The Federal Transit Administration's (FTA) 5310 program requires that all projects selected for award address at least one need or strategy identified in the *Cherriots Coordinated Public Transportation – Human Services Transportation Plan* dated August, 2016 ("The Coordinated Plan"). A link to this document can be found on the District's website: <http://www.cherriots.org/en/grants>

2017 Section 5310(FTA) Grant Application Instructions for Projects Located Within the Salem-Keizer Urban Growth Boundary

Local Match Requirements

Capital projects require a 20% local match. Operating projects require a 50% local match.

Local match must be provided from sources other than Federal Department of Transportation (DOT) funds. Examples of sources of local match that may be used include the following:

- State or local appropriations
- Other non-DOT Federal funds
- Dedicated tax revenues
- Private donations
- Revenue from human service contracts
- Net income generated from advertising and concessions

Farebox revenue may not be used as local match. Farebox revenue is considered income and is deducted from total operating cost to determine the net cost of the activity.

The use of a non-cash local match is allowable and can include volunteer transportation program services, physical improvements, and computer work station hardware and software.

Application Submittal Instructions

1. Application forms are available beginning January 23, 2018.
2. Applications are available for download online at <http://www.cherriots.org/en/grants>. The application is provided as a fillable Adobe pdf document.
3. Completed applications must be received by 12:00 pm on March 19, 2018 in order to be considered eligible for funding:
 - email the Word document or Adobe pdf to ted.stonecliffe@cherriots.org
 - paper copies will not be accepted
4. Incomplete and/or late applications will not be eligible for award.
5. Applicants will be notified of project award after the April 26, 2018 Cherriots Board of Directors Meeting. Alternative formats are available upon request.

2017 Section 5310(FTA) Grant Application Instructions for Projects Located Within the Salem-Keizer Urban Growth Boundary

Further details regarding other contracting matters are contained in the Program Management Plan:

- Eligible Project Activities, p. 2
- Project Selection Criteria, p. 18
- Civil Rights Responsibilities, p. 23
- Section 504 and ADA Reporting, p. 26
- Program Measures (Quarterly Reporting Requirements), p. 27
- Other Provisions, p. 31

Grant Award Process:

Cherriots administers the grant process for these funds, selects the projects, and sends copies of the agreements to FTA for their records. A Technical Advisory Committee (TAC) made up of STF Advisory Committee (STFAC) members, two members of the public, and one representative of the Mid-Willamette Valley Council of Governments (MWVCOG) will convene at a meeting two weeks after the application deadline (Apr. 3, 2018). Applicants are required to present their project ideas to the TAC in order for funding recommendations to be made to the STFAC. The STFAC will review the TAC's recommendation and make project recommendations to the Cherriots Board.

Once the funding recommendation is approved by the Cherriots Board of Directors, Cherriots staff drafts agreements with recipients and sends a copy to FTA. Grant awards are eligible for reimbursement through June 30, 2019.

Timeline:

- March 19, 2018 – All applications due at Cherriots by 12:00 pm
- March 19, 2018 – Applications mailed and emailed to Technical Advisory Committee (TAC) members
- April 3, 2018 (2:00 – 3:00 p.m.) – TAC meets to hear applicant presentations and determines priorities to recommend to STF Advisory Committee (STFAC)
- April 3, 2018 (3:00 – 4:30 p.m.) – STFAC meets to recommend a prioritization ranking of projects to Cherriots Board
- April 26, 2018 – Cherriots Board approval of STFAC recommendations
- July 1, 2018 – 5310 grant agreements executed

Questions? Contact:

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**2017 Section 5310(FTA) Grant Application Instructions
for Projects Located Within the Salem-Keizer Urban Growth Boundary**

