CHERRIOTS

2019-2021
SECTION 5310 (ODOT) FORMULA GRANT APPLICATION

FOR PROJECTS LOCATED WITHIN MARION AND POLK COUNTIES

DECEMBER 14, 2018

2019-2021 Section 5310(ODOT) Formula Grant Application
for Projects Located Within Marion and Polk Counties

INTRODUCTION

- Read the Cherriots *2019-2021 Section 5310(ODOT) Formula Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- DO NOT submit the application for subrecipients on the "Funding Opportunities" section of the ODOT RPTD website. Only submit this application to Salem Area Mass Transit District (SAMTD) following the instructions referenced above.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using the online form and submitted in Adobe .pdf format. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

Submittal Checklist

Make sure

✓ Application is complete, signed, and dated

Submit

✓ Proof of agency status (template included in application packet)

✓ Maintenance Plan (if submitting an application for preventive maintenance)

A. ORGANIZATION INFORMATION

Name of Organization: Salem Area Mass Transit District

Employer Identification Number (EIN): 93-0793128

Contact Person: Trisha Bunsen

Contact Person Title: Grants Administrator

Address: 555 Court St Suite 5230; Salem, OR 97301

Telephone: 503.361.7504

Email: trisha.bunsen@cherriots.org

Type of Organization (check one)

Government Agency	○
Private Not-for-Profit	○
Other	◉

Area of service (check one)

Inside Marion and Polk Counties	○
Outside Marion and Polk Counties	○
Both inside and outside Marion and Polk Counties	◉

Organization Days and Hours of Operation

Day	**Hours**
Sunday	
Monday	5:00 am-11:04 PM
Tuesday	5:00 am-11:04 PM
Wednesday	5:00 am-11:04 PM
Thursday	5:00 am-11:04 PM
Friday	5:00 am-11:04 PM
Saturday	10:00am –4:00pm call center only
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)	Beginning in September 2019, Cherriots will be expanding weeknights and Saturday service.

Total transportation program costs by year

FY18 (historical data, if applicable)	FY19 (projected, if applicable)	FY20 (projected)	FY21 (projected)
$ $45,974,020	$ 63,305,032	$ 69,635,535	$ 73,117,311

Risk Assessment

		Yes	No
Are any FTA-funded buildings that your transit agency owns located in a flood zone?		☒	☐
If yes, do you have flood insurance?		☒	☐
Did your agency have any turnover of management or financial staff in the last two years?		☒	☐
Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?		☒	☐
Does your agency have a system in place that will account for 100 percent of each employee's time?		☒	☐
Did your staff members attend required trainings and meetings during prior grant awards?		☒	☐
Was your agency audited by the Federal government in the past two years?		☐	☒
If yes, did the audit result in one or more audit findings?		☐	☒
Did your agency stay on budget in the past two years?		☒	☐
	Manual	**Automated**	**Combined**
What type of accounting system does your agency use?	☐	☐	☒

B. PROJECT INFORMATION

Project Title (*will be used for reviewer reference and in public comment process. Example: Mobility Management for City of Utopia Transit Service)*

Mobility Managment

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

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	All of Marion and Polk counties and the Santiam Canyon in Linn County.

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

Start date

July 1,2019

Project Service Types (check all that apply) *What type of services will be supported with this Section 5310(ODOT) grant?*

A. Open to the general public at all times	☑
B. Open only to seniors and individuals with disabilities	☑
C. Demand response	☑
D. Open to the general public on a space-available basis	☐
E. Limited to defined clientele (i.e., group residential home)	☐
F. Deviated route	☐
G. Other (define): commuter	☑

Project Type (check one) *Select the project type that you wish to include in your application.*

Project Type	Existing Service	New Service
A. Purchased service	☐	☐
B. Mobility Management	☑	☐
C. Replacement Vehicle(s)	☐	☐
D. Service Expansion and Right-sizing Vehicles	☐	☐
E. Preventive Maintenance	☐	☐
F. Equipment	☐	☐
G. Signs and Other Bus Stop Amenities	☐	☐
H. Passenger Shelters	☐	☐
I. Facilities (Bus Barns and Other Buildings)	☐	☐

Total Section 5310(ODOT) funds requested

$403,946

Total grant funds requested by year

	FY20	FY21
Section 5310 project	$201,973	$201,973

Scalable Section 5310(ODOT) Grant Request

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

Scalability Description:

Mobility Management costs are primarily staff costs. This project proposes to maintain the existing level of services without raising costs by changing the staffing mix. Therefore, we are asking for the full amount to maintain the project. Any additional cuts will necessitate cut back of services.

	FY20	FY21
Scaled request:	$ 201,973	$ 201,973

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

Estimated Additional Project Resources	
Source of Funds	**Dollar Amount**
2019-2021 Section 5310(ODOT) Grant Request (*Important!)*	$ 403,946
Local Resources (to meet matching requirements)	$
Federal Resources	$
Other (provide description): STF funds	$ 46,234
Project Grand Total	**$** 450,180

Coordinated Plan

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016? ◉ Yes ○ No If yes, what page(s)? p. 68

If no, explain why the project is not part of the Coordinated Plan.
For example: Is the project part of another plan (please name)? Is the plan still being finalized?

1. **Project Description**
   a.) **Describe services or capital investment to be provided by Section 5310 funding by answering the questions below based on the type of project** *(limit 500 words)*:

- For Purchased Service projects, please provide the following:
  - Explain how your project is planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when general public transit is either insufficient, inappropriate, or not available.
  - Is this project part of a group of activities or projects that are dependent on each other (for example, a new transit service that requires capital and operating funds)?
  - Does your agency have an existing contract with Cherriots and/or ODOT to provide transit services? If yes, name the contractor. If no, describe how the transit agency will procure the service and name contractor.
- For Mobility Management projects, please:
  - Explain how your project is planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when general public transit is either insufficient, inappropriate, or not available.
  - Identify the estimated number of customer contacts, customers trained, or mobility products/services produced. Describe the method you will use to measure output from the project.
- For Vehicle Purchases (replacement or expansion vehicles), please:
  - Describe how the vehicles will be used in service to seniors and individuals with disabilities
- For Equipment, Signs, Amenities, and Shelter projects:
  - Will this project disturb the ground? If yes, an environmental worksheet including site map(s) showing placement of each item must be submitted to Cherriots and ODOT, and approved by FTA prior to payment for any ground-disturbing activities. Submittal of the draft environmental worksheets at the time of this application is optional.
  - Describe why these equipment, signs, amenities, and/or shelters are needed and how they will be used in providing transit service to seniors and individuals with disabilities.
- For Facilities including Transit Centers, Bus Barns, and Transit Agency Building projects:
  - Will this project disturb the ground? If yes, an environmental worksheet including site map(s) showing placement of each item must be submitted to RPTD and approved by FTA prior to payment for any ground-disturbing activities.
  - Explain why this facility project is needed and how the facility will be used in providing transit service to seniors and individuals with disabilities
  - Provide a description of the facility project request as one of the following:
    - Siting and Right-of-Way, Planning, Architecture, Engineering, Project Management, Construction Contracting, Inspecting and Permitting, Interior Surfaces and Furnishings

(limit 500 words).

This project coordinates and seeks to expand on transportation services for seniors, individuals with disabilities, as well as disadvantaged populations within the Salem-Keizer and surrounding rural communities to assist persons to overcome the barriers to access public transportation. This project will fund three positions: Travel Trainer, Mobility Management Coordinator, and Customer Service Manager.

The Mobility Management Coordinator is vital to Cherriots forging partnerships, collaborations, and opportunities within the community ensuring that Cherriots is viewed as a positive, contributing community partner; therefore enhancing the awareness of transportation services and programs that are available. With the enhanced awareness, agencies, advocates, and community members can access public transportation themselves as well as share what they have learned about Cherriots transportation services and programs leading to other people accessing public transportation. The coordinator also gathers and analyzes collected data to evaluate transportation service options for persons with disabilities as well as maps, implements, and coordinates educational programs to address community transportation needs, informing the community of efficient ways to access existing transportation services. The Travel Trainer and the Coordinator jointly provide community presentations so that attendees are not only aware of transportation options but also how to access them on an individual level. Experience has shown, that when the travel trainer attends community presentations, individuals are more likely to utilize travel training services.

The Travel Trainer fills a more specialized role by providing individualized training. The Travel Trainer evaluates customer needs and abilities, then matches existing and potential riders with the services that are most appropriate to meet their transportation requirements. Travel training provides essential instruction on how to access and utilize public transportation. The Cherriots Travel Trainer might travel with a person 4 or 5 times depending on the complexity of the trip and their ability or only once.

The Customer Service Manager provides oversight of Transit Host and Cherriots LIFT Eligibility program. Transit Hosts operate outside on the Downtown Transit Center mall to assist seniors and people with disabilities in addition to the general public access the correct bus and provide trip planning. Transit hosts track number of customers served each day. In FY 17/18, Transit Hosts averaged over 39 contacts per day and had over 6,000 trip planning interactions.

The project also promotes transportation services and programs on social media channels, the web, targeted geographic location mailers, and advertisements in local newspapers.

Cherriots will measure the outcome results defined by a biennial work plan described in more detail in the outcome section below.

In FY 17/18:

- 271 individuals were successfully travel trained
- 948,058 trips were provided on Cherriots Local with reduced fare that includes seniors 60+, individuals with disabilities, and youth
- 9,883 trips were provided on Cherriots Shop and Ride service specific for seniors 60+ and individuals with disabilities
- Cherriots Mobility Management staff attended 186 meetings, presentations, and hosted informational table events to educate and inform on Cherriots transportation services and

b.) Describe how this project coordinates with other services to provide services to seniors and individuals with disabilities. *Limit 200 words.*

Mobility Management (MM) by definition includes coordination of services and providers. SAMTD MM project coordinates with partners by programming outreach with partners to educate them about existing services and to learn about their needs. The mobility coordinator attends local, regional, and state meetings to learn about other service providers and coordinate services on a broader level. Internally this project coordinates with the Cherriots Call Center. The Call Center is a central clearinghouse for public transportation services and

c.) Expected Outcomes

- For Purchased Service projects, please provide:
  - Estimated number of unduplicated individuals (older adults and individuals with disabilities) this project proposes to support in the biennial grant period
  - Estimated number of one-way rides this project proposes to provide in the biennial grant period
- For Mobility Management projects, please:
  - Identify the estimated number of customer contacts, customers trained, or mobility products/services produced. Describe the method you will use to measure output from the project.
- For all projects, please explain why is this project the best method to address the needs identified in the Coordinated Plan? *Limit 400 words.*

Expected Outcomes:
• Continued awareness of availability and value of transit services in the community.
• Increase public support for local transportation such that people are utilizing services and programs more, as well as recommending to others they serve.
• Maintain continuity of customer service wherever riders connect for Cherriots services such that service offered to individuals is seamless.
• Increase in ridership of existing services in order to gain access to jobs, school, medical facilities, shopping, and recreational locations.
• Maintain the number of public outreach events provided to engage stakeholders, our riders, and the general public.

d.) Is this project part of a group of activities or projects that are dependent on each other (for example, a bus washing station that is dependent on a facility)? If yes, please describe.

No, this project is not dependent on another project. Mobility Management relies on trained staff to provide the outreach and training, program oversight, data collection and analysis, and quarterly and annual reporting to funders. One of the activities is transit hosts provided by an outside agency.

e.) For vehicle purchases and preventive maintenance projects, a Vehicle Preventive Maintenance Plan must be submitted by the time the grant agreement is signed. A plan reflecting current fleet policies, fleet procedures, and vehicle and lift equipment manufacturer's recommended maintenance schedules is required. You may attach supporting documentation.

Electronic document attached ☑

This does not apply to Mobility Management.

2. Project Budget

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	$373,562

Contracted services	$
Materials and supplies	$
Purchased Service	$
Preventive maintenance	$
Capital equipment	$
Technology	$
Marketing	$
Other (describe) transit host	$ 63,618
Other (describe) printing, travel,media	$ 13,000
Other (describe)	$
Project Total	$ 450,180
Amount requested in this grant	$ 403,946

2a. Describe the source of your local match funds in the field below (examples: funds from your budget or STF funds). If the matching funds are not available now, describe when they will be (examples: next fiscal year, month/year). Please be specific.

The source of local match will be STF funds.

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

	Milestone Description	Completion Date
1	Mobility Management Start	7/1/2019
2	Mobility Management End	6/30/2021
3		
4		
5		
6		
7		
8		
9		
10		

4. Is your application for a new vehicle? ○ Yes (continue to #5) ◉ No (go on to Section C)

5. Enter the following information about each vehicle to be replaced:

Year	Make/ Model	Vehicle Category*	VIN	Total Seats	ADA Seats	Current Mileage	Vehicle Condition	Maintenance History (Issues, repairs, etc.)
		Choose						
		Choose						
		Choose						
		Choose						
		Choose						

5a. Will you use the ODOT/DAS state price agreement contract? (Yes○ No◉)

If No, describe the needs not addressed in state contracts (e.g., no contracts for trolley-style vehicles, no contracts for buses larger than 44 passengers, etc.). Note that under new FTA guidelines, piggybacking on outside contracts is strictly limited.

5b. Vehicles to be purchased:

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

Choose							Choose		
Choose							Choose		
Choose							Choose		
Totals:		**Grand Total:**							

Vehicle Category Descriptions: http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf
**Fuel Type Options: (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.*
Estimated Delivery Date: *Minimum 160 days if ADA accessible.*

6. **For Facilities projects only (including Transit Centers, Bus Barns, and Transit Agency Buildings), please complete the questions below about your facility project. Please be brief, but thorough, and answer all questions. If your project is tentatively accepted for funding, you may be asked to complete a supplemental application.**

A. Total scope of entire facility project

B. Portion of project scope applied for in this grant. (If all, state this)

C. Proposed total square feet of facility

D. Other secured funding sources for this project

E. Other anticipated funding sources for this project

F. Who are the designated partner agencies for this project?

G. Who are the other stakeholders for this project, and how is their support being enlisted?

H. Describe how support from local elected officials or bodies has been formally received for this project.

I. Describe how the project fits into the regional coordinated plan.

J. Has this project been thoroughly discussed with your Rail and Public Transit Section Regional Transit Coordinator and has the Regional Transit Coordinator been involved with preliminary project planning efforts? (Yes No).

K. H as your local Area Commission on Transportation been involved and is it in support of this project? (Yes No).

L. Project Milestones: List each of the project's major phases or milestones below. Include associated costs and completion date for each item.

Estimated final completion date of all project activities

M. Is property for facility owned by your agency or an affiliate body? (Yes No).

If an acquisition, has a firm offer been made on this project, and when?

N. Has preliminary project planning been accomplished for this project? (Yes No).

O. Have requisite local agency planning, zoning, building permits and all approvals been applied for and received for this project? (Yes No).

P. Does this project involve changes to any railroad rights of way? (Yes No).

Q. Have all relevant project documents been attached to your grant application? If not, please send them via email to ted.stonecliffe@cherriots.org. (Yes No).

R. Is there any other information you wish reviewers to understand about this project? Yes No). If yes, please explain on next page:

C. ORGANIZATIONAL CERTIFICATION

By submitting this document via email to Salem Area Mass Transit District (SAMTD), I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

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

Signature of Authorized Organization Officer	Title	Date
	Grant Administrator	1/15/19

Private Nonprofit Agency – Corporation Status Inquiry and Certification

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

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

Private Non-profits

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

Certifying Representative

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

Cherriots 5310 (ODOT) Grant Application
Project: Mobility Management
Answer, Section 1. Project Description, a.):
This project coordinates and seeks to expand on transportation services for seniors, individuals with disabilities, as well as disadvantaged populations within the Salem-Keizer and surrounding rural communities to assist persons to overcome the barriers to access public transportation. This project will fund three positions: Travel Trainer, Mobility Management Coordinator, and Customer Service Manager.

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The project also promotes transportation services and programs on social media channels, the web, targeted geographic location mailers, and advertisements in local newspapers.

Cherriots will measure the outcome results defined by a biennial work plan described in more detail in the outcome section below.

In FY 17/18:

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- Cherriots Mobility Management staff attended 186 meetings, presentations, and hosted informational table events to educate and inform on Cherriots transportation services and programs

The Mobility Manager collects data on outcome measures and reports progress quarterly. Annually, outcomes are analyzed and outcome achievements are reported.

Answer, Section 1. Project Description, b.):
Mobility Management (MM) by definition includes coordination of services and providers. SAMTD MM project coordinates with partners by programming outreach with partners to educate them about existing services and to learn about their needs. The mobility coordinator attends local, regional, and state meetings to learn about other service providers and coordinate services on a broader level. Internally this project coordinates with the Cherriots Call Center. The Call Center is a central clearinghouse for public transportation services and programs within Marion and Polk counties by scheduling requested trips on Cherriots Regional, LIFT, and Shop and Ride. The ability to schedule requested trips at one centralized location allows for easy coordination of services between providers, therefore eliminating duplication of services and provides an invaluable cost saving. Additionally, the continuation of coordination and scheduling of trips for seniors, individuals with disabilities, and disadvantaged populations ensures that public transportation is accessible and readily available for utilization.

Answer, Section 1. Project Description, c.):
Expected Outcomes:

- Continued awareness of availability and value of transit services in the community.
- Increase public support for local transportation such that people are utilizing services and programs more, as well as recommending to others they serve.
- Maintain continuity of customer service wherever riders connect for Cherriots services such that service offered to individuals is seamless.
- Increase in ridership of existing services in order to gain access to jobs, school, medical facilities, shopping, and recreational locations.
- Maintain the number of public outreach events provided to engage stakeholders, our riders, and the general public.

Based on previous year's performance measure data collected related to customer contacts, it is expected that: 5,000 customers, advocates, and agencies will be directly, positively impacted by gaining knowledge and understanding of Cherriots transportation services and programs and 60 individuals will be successfully travel trained. These performance measures in addition to many more will be collected for the Mobility Management Work Plan, tracked, the data collected, reported on a quarterly basis, and then reported on annual basis and submitted to ODOT as applicable