

Salem Area Mass Transit District

**BOARD OF DIRECTORS MEETING**

Thursday, June 23, 2016

6:30 PM

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

**AGENDA**

<b>A. CALL TO ORDER &amp; NOTE OF ATTENDANCE</b>	
<b>B. PLEDGE OF ALLEGIANCE</b> – Director Jerry Thompson	
<b>C. ANNOUNCEMENTS &amp; CHANGES TO AGENDA</b>	
<b>D. BUDGET HEARING</b>	<b>1</b>
This is the time on the agenda designated for testimony by anyone on the subject of adopting the Salem Area Mass Transit District Budget for Fiscal Year 2017 that was approved by the Budget Committee on May 19, 2016. ....[Supplemental Packet]	
<b>DELIBERATION OF BUDGET HEARING</b>	
Shall the Board adopt Resolution No. 2016-05 for the Adoption of the Fiscal Year 2017 Budget, Making Appropriations, and Imposing and Categorizing Taxes .....	
	<b>3</b>
<b>E. PUBLIC COMMENT</b> - Each person’s comments are limited to three (3) minutes.	
<b>F. CONSENT CALENDAR</b>	
1. <b><u>Approval of Minutes [Action]</u></b>	
a. Board Meeting of May 26, 2016 .....	<b>5</b>
2. <b><u>Routine Business Items [Action]</u></b>	
a. Adopt the Board Meeting Calendar for Fiscal Year 2017 .....	<b>11</b>
b. Approval of the United Way Donation for Fiscal Year 2017 .....	<b>13</b>
c. Resolution No. 2016-06 Amending the Fiscal Year 2016 Adopted Budget .....	<b>17</b>
<b>G. ITEMS DEFERRED FROM THE CONSENT CALENDAR</b>	
<b>H. ACTION ITEMS</b>	
1. Approval of West Salem Connector Pilot Project Extension .....	<b>19</b>
<b>I. INFORMATION ITEMS</b>	
<b>J. REPORTS</b>	
1. Board Subcommittee Reports [ <i>Receive and File</i> ] .....	<b>93</b>
Board members are appointed to local, regional, or national committees and also present testimony at public hearings on specific issues as the need arises. After these meetings, public hearings, or other activities, time is scheduled for an oral report/update.	
a. Minutes of May 9, 2016 Work Session .....	<b>94</b>
<b>K. BOARD &amp; MANAGEMENT ISSUES</b>	
1. General Manager	
2. Board President	
3. Board of Directors	
<b>L. ADJOURNMENT</b>	

## Next Regular Board Meeting Date: Thursday, July 28, 2016

### BOARD MEETING PROCEDURES

- **CONSENT CALENDAR AND AGENDA ITEMS** All items on the Consent Calendar will be adopted as a group by a single motion unless a Board member requests to withdraw an item for discussion. Action on items requested for discussion will be deferred until after adoption of the Consent Calendar. Comments on specific items will be taken after the staff report and before Board discussion for each agenda item.
- **APPEARANCE OF INTERESTED CITIZENS & AGENCIES** Time is designated on every Board agenda for questions or statements by persons in the audience on any items of Board business, including those items appearing on the agenda that are subject to public hearing. Individual citizens will be invited to come forward in a manner similar to that prescribed for public hearings and make any statement they wish, being limited to three minutes. Members of any agency wishing to make statements should submit their statement in writing to the Clerk of the Board per the agenda deadline below. At the designated meeting, the agency representative will be invited to come forward to speak for a limit of five minutes on their item.
- **TO GET ITEMS ON THE AGENDA** All communication and matters that appear on the Board agenda must be submitted to the Clerk of the Board by noon on Wednesday, one week prior to the Board meeting. You are encouraged to mail, email or bring your written communication to Salem-Keizer Transit, 555 Court St NE, Suite 5230, Salem, OR 97301. The Board of Directors email address is: [Board@cherriots.org](mailto:Board@cherriots.org)
- **SPECIAL ACCOMMODATIONS** Those individuals needing special accommodations such as sign or other language interpreters to participate in the Board meeting must request such services at least 48 hours prior to the meeting. Please direct your request to the Clerk of the Board at 503-588-2424. Individuals with a hearing impairment may call Oregon Telecommunications Relay Service, 711.

### PROCEDIMIENTOS DE LA REUNIÓN

- **CALENDARIO DE CONSENTIMIENTO Y ARTÍCULOS DE AGENDA** Todos los artículos en el Calendario de Consentimiento serán adoptados como grupo por un única propuesta a menos que un miembro de la Junta solicita retirar un artículo para discusión. La acción sobre artículos solicitados para discusión serán diferidos hasta después de la adopción del Calendario de Consentimiento. Comentarios sobre artículos específicos serán adoptadas tras el informe de personal y antes de la discusión de la Junta para cada orden del día.
- **COMPARECENCIA DE LOS CIUDADANOS Y AGENCIAS INTERESADAS** Este es el tiempo designado en cada orden del día de la Junta para preguntas o declaraciones por las personas en la audiencia, de cualquiera de los puntos de los asuntos de la Junta, incluyendo aquellos puntos que aparecen en el orden del día que estén sujetos a una audiencia pública. Se le invita a los ciudadanos individuales a presentarse en una forma similar a los prescritos para las audiencias públicas y a hacer cualquier declaración que deseen, estando limitadas a (3) minutos. Cualquier miembro de una agencia que desee hacer declaraciones en ese momento debe enviar la información al personal de la Junta de acuerdo a los plazos abajo mencionados. En la reunión designada, el miembro de la agencia será invitado a presentarse para hablar, con un límite de (5) minutos en su asunto.
- **PARA TENER ASUNTOS EN EL ORDEN DEL DIA** Para que todas las comunicaciones y asuntos aparezcan en el orden del día de la Junta, deben ser enviados al personal de la Junta antes del mediodía del miércoles de la semana previa a la reunión de la Junta. Si Ud. tiene algún asunto que quiera presentar ante la Junta en el futuro, le animamos a mandarlo por correo o traer una comunicación por escrito al Distrito de Transito del Área de Salem, 555 Court St NE, Suite 5230, Salem, OR 97301; 503-588-2424; [Board@cherriots.org](mailto:Board@cherriots.org)
- **NECESIDADES ESPECIALES** Aquellos individuos que necesiten servicios especiales como Interpretes para el lenguaje de señales u otros, para participar en la reunión de la Junta, deben solicitar dichos servicios al menos 48 horas antes de la reunión. Por favor dirigir su solicitud al Secretario de la Junta al 503-588-2424. Las personas sordas por favor llamar al Servicio de Telecomunicaciones de Oregón, 711.

For an electronic copy of the Board meeting agenda packet, go to [www.cherriots.org/board](http://www.cherriots.org/board). Regular Board meetings are televised on Channel 21; and can be viewed at any time on CCTV's website at <http://www.cctvsalem.org/>

SAMTD Board of Directors Email: [Board@cherriots.org](mailto:Board@cherriots.org)  
General Manager's Office / Salem-Keizer Transit  
555 Court Street NE, Suite 5230 / Salem, OR 97301  
Phone (503) 588-2424 / Website: [cherriots.org/board](http://cherriots.org/board)

**FORM LB-1****NOTICE OF BUDGET HEARING**

A public meeting of the Salem Area Mass Transit District will be held on June 23, 2016 at 6:30 pm at the Senator Hearing Room in Courthouse Square, 555 Court St NE, Salem, OR 97301. The purpose of this meeting is to discuss the budget for the fiscal year beginning July 1, 2016 as approved by the Salem Area Mass Transit District Budget Committee. A summary of the budget is presented below. A copy of the budget may be inspected or obtained at the Salem-Keizer Transit Administration Office at 555 Court St NE, Suite 5230, Salem, OR 97301, between the hours of 8 a.m. and 5 p.m. This budget is for an annual budget period. This budget was prepared on a basis of accounting that is the same as used the preceding year.

Contact: Jared Isaksen

Telephone: 503-588-2424

Email: jared.isaksen@cherriots.org

**FINANCIAL SUMMARY - RESOURCES**

<b>TOTAL OF ALL FUNDS</b>	Actual Amount 2014-15	Adopted Budget This Year 2015-16	Approved Budget Next Year 2016-17
Beginning Fund Balance/Net Working Capital	15,339,646	18,380,877	22,073,500
Fees, Licenses, Permits, Fines, Assessments & Other Service Charges	2,817,615	2,791,115	2,785,300
Federal, State and All Other Grants, Gifts, Allocations and Donations	30,309,475	39,483,396	40,037,800
Interfund Transfers / Internal Service Reimbursements	102,842	0	127,000
All Other Resources Except Property Taxes	181,706	326,500	196,600
Property Taxes Estimated to be Received	10,777,993	10,557,639	11,312,700
<b>Total Resources</b>	<b>59,529,277</b>	<b>71,539,527</b>	<b>76,532,900</b>

**FINANCIAL SUMMARY - REQUIREMENTS BY OBJECT CLASSIFICATION**

Personnel Services	17,753,788	19,920,054	20,164,300
Materials and Services	20,347,759	23,205,346	22,182,000
Capital Outlay	953,437	7,701,512	13,127,800
Interfund Transfers	102,842	0	127,000
Contingencies	0	1,500,000	1,500,000
Unappropriated Ending Balance and Reserved for Future Expenditure	0	19,212,615	19,431,800
<b>Total Requirements</b>	<b>39,157,826</b>	<b>71,539,527</b>	<b>76,532,900</b>

<b>FINANCIAL SUMMARY - REQUIREMENTS BY ORGANIZATIONAL UNIT OR PROGRAM</b>			
<b>Name of Organizational Unit or Program FTE for that unit or program</b>			
General Manager/Board of Directors	534,071	641,157	603,900
FTE	2.00	2.00	2.00
Administration	1,622,812	1,758,758	1,813,400
FTE	12.10	11.80	12.80
Communication	981,072	1,285,596	1,582,700
FTE	9.10	9.00	8.80
Transportation Development	1,601,676	1,749,722	1,991,500
FTE	8.10	9.40	10.60
Operations	15,478,171	17,757,811	17,196,800
FTE	144.40	144.30	146.60
Transportation Programs Fund	14,117,489	18,726,790	17,709,300
FTE	12.60	11.80	11.50
Capital Projects Fund	1,079,657	7,701,511	13,423,100
FTE	1.40	1.20	3.20
Non-Departmental / Non-Program	3,742,878	21,918,182	22,212,200
FTE	0.00	0.00	0.00
<b>Total Requirements</b>	<b>39,157,826</b>	<b>71,539,527</b>	<b>76,532,900</b>
<b>Total FTE</b>	<b>189.70</b>	<b>189.50</b>	<b>195.50</b>

**STATEMENT OF CHANGES IN ACTIVITIES and SOURCES OF FINANCING**

The Capital Projects fund has three major projects in the budget for fiscal year 2016-17, Keizer Transit Center Improvements, South Salem Transit Center and Bus Stops & Shelters.

<b>PROPERTY TAX LEVIES</b>			
	Rate Imposed	Rate Imposed	Rate Imposed
Permanent Rate Levy (rate limit .7609 per \$1,000)	.7609	.7609	.7609

**MEMO TO: BOARD OF DIRECTORS**

**FROM: JARED ISAKSEN, FINANCE MANAGER**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: RESOLUTION #2016-05 ADOPTING FISCAL YEAR 2016-2017  
BUDGET, MAKING APPROPRIATIONS, IMPOSING AND  
CATEGORIZING TAXES**

**Issue**

Shall the Board of Directors adopt Resolution #2016-05, to adopt the FY2016-2017 Budget, making the appropriations accordingly, and imposing, and categorizing the taxes?

**Background and Findings**

In accordance with Oregon State Budget Law, the Budget Committee reviewed and approved the FY2016-2017 Budget on May 19, 2016 for a total of all funds of \$57,101,100.

Bill Holmstrom, the Budget Committee Chair asked that the Board set the Budget Hearing following approval by the Budget Committee. The budget summary and notice of a public hearing (attached) were published as required by law. The Budget Hearing was scheduled for June 23, 2016 and will occur prior to the Board's consideration of Resolution #2016-05 for adoption of the budget.

The Budget Committee approved a tax rate of \$.7609 per \$1,000 of assessed value, the permanent rate set by Measure 50. Resolution #2016-05 also imposes and categorizes taxes in accordance with Oregon Budget Law requirements.

**Recommendation**

Adopt Resolution #2016-05, thereby adopting the FY2016-2017 Budget and imposing and categorizing property taxes.

**Proposed Motion**

**I move the Board adopt Resolution #2016-05 to adopt the FY2016-2017 Budget, making appropriations; and imposing and categorizing taxes.**

**RESOLUTION #2016-05**

**ADOPTING THE BUDGET**

BE IT RESOLVED that the Board of Directors of the Salem Area Mass Transit District hereby adopts the budget for the fiscal year 2016-2017 in the total of \$76,532,900 now on file at the District Administration Office, 555 Court St., NE, Suite 5230, Salem, OR 97301.

**MAKING APPROPRIATIONS**

BE IT RESOLVED that the amounts for the fiscal year beginning July 1, 2016, and for the purposes shown below are hereby appropriated:

<u>General Fund</u>		<u>Transportation Programs Fund</u>	
General Manager/Board of Directors	\$ 603,900	Communication	\$ 233,300
Administration	1,813,400	Transportation Development	661,700
Communication	1,582,700	Operations	16,814,300
Transportation Development	1,991,500	Transfers	127,000
Operations	17,196,800	<b>Total</b>	<b>\$ 17,836,300</b>
Unallocated - General Administration	1,153,400		
Transfers	-		
Contingency	1,500,000		
<b>Total</b>	<b>\$ 25,841,700</b>		
<u>Capital Project Fund</u>			
Administration	\$ 349,000		
Transportation Development	5,438,300		
Operations	7,635,800		
Transfers	-		
<b>Total</b>	<b>\$ 13,423,100</b>		
		<b>Total Appropriations, All Funds</b>	<b>\$ 57,101,100</b>
		Total Unappropriated and Reserve Amounts, All Funds	\$ 19,431,800
		<b>TOTAL ADOPTED BUDGET</b>	<b>\$ 76,532,900</b>

**IMPOSING THE TAX**

BE IT RESOLVED that the Board of Directors of the Salem Area Mass Transit District hereby imposes the taxes provided for in the adopted budget at the rate of \$.7609 per \$1,000 of assessed value for operations; and that these taxes are hereby imposed and categorized for tax year 2016-2017 upon assessed value of all taxable property within the district as follows:

**CATEGORIZING THE TAX**

<b>General Government Limitation</b>	<b>Excluded from Limitation</b>
Permanent Rate Tax.....\$.7609/\$1,000	\$0.00

The above resolution statements were approved and declared adopted on this 23rd day of June 2016.

**ATTEST:**

X \_\_\_\_\_  
President  
Board of Directors

X \_\_\_\_\_  
Secretary  
Board of Directors

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

**May 26, 2016, 2016**

**Index of Board Actions**

<u>Action</u>	<u>Page</u>
Moved to approve the Consent Calendar: .....	2
1. <u>Approval of Minutes</u>	
a. Executive Session and Regular Board Meeting of April 28, 2016	

Moved to approve the applications for the federal Section 5310 and STF grants as shown in Attachments C through F and as recommended by the STF Advisory Committee; and further moved to authorize the General Manager to enter into agreements with Salem Health for their proposed project and to proceed with the federal application for FFY16 5310 funding. The remaining STF dollars should be allocated to the CARTS operating budget. .... 3

**Table 1. Summary of Projects in Section 5310 and STF Applications**

Applicant	Project Description	Grant Request	Match	Total	Total Allocation
Salem-Keizer Transit	RED Line Preventative Maintenance	\$ 14,400	\$ 3,600	\$ 18,000	
Salem-Keizer Transit	RED Line Purchased Service	100,816	25,204	126,020	
Salem-Keizer Transit	Mobility Management	108,817	27,204	136,021	
<b>Section 5310 Total</b>		<b>\$ 224,033</b>	<b>\$ 56,008</b>	<b>\$280,041</b>	<b>\$ 224,033</b>
<hr/>					
Salem Health	Transportation Coordinator	32,000	-	32,000	
<b>STF Total</b>		<b>\$ 32,000</b>	<b>-</b>	<b>\$ 32,000</b>	<b>\$ 32,599</b>

Moved to approve Intergovernmental Agreement No. DASPS 107420-16 with the State of Oregon Department of Administrative Services-Fleet and Parking Services; and authorize the general manager to sign the agreement. .... 4

Nominate Director Lincoln to review the compilation of the general manager's comprehensive performance evaluation. .... 4

Minutes recorded by Linda Galeazzi, Executive Assistant

Regular Board meetings are video recorded and are available for viewing on the CCTV website at [www.cctvsalem.org](http://www.cctvsalem.org).

Salem Area Mass Transit District  
BOARD OF DIRECTORS

**MINUTES**

May 26, 2016

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

PRESENT: Board	President Robert Krebs; Directors John Hammill, Colleen Busch, Marcia Kelley, Jerry Thompson, Steve Evans, and Kathy Lincoln
Staff	Allan Pollock, General Manager; David Trimble, Chief Operating Officer; Paula Dixon, Director of Administration; Steve Dickey, Director of Transportation Development; Jared Isaksen, Finance Manager; Wendy Feth, Accountant; Roxanne Rolls, Rideshare & Outreach Coordinator; Ted Stonecliffe, Long-Range Planning Analyst; Matt Berggren, Planning Technician; Susie Primmer, Technology Services Support Analyst; Linda Galeazzi, Executive Assistant; Ben Fetherston, SAMTD Legal Counsel
Guests	Tanya DeHart, Chair, Special Transportation Fund Advisory Committee (STFAC); Brandon Primmer, Youth Citizen

**A. CALL TO ORDER AND NOTE OF ATTENDANCE** **6:31 PM**  
President Krebs called the meeting to order. Attendance was noted and a quorum was present.

**B. PLEDGE OF ALLEGIANCE**  
Director John Hammill led the Pledge of Allegiance.

**C. ANNOUNCEMENTS AND CHANGES TO THE AGENDA** - None

**D. PRESENTATION** - None

**E. PUBLIC COMMENT** - None

**F. CONSENT CALENDAR** **6:32PM**

Motion: Moved to approve the Consent Calendar:  
2. Approval of Minutes  
a. Executive Session and Regular Board Meeting of April 28, 2016

Motion by: Director John Hammill

Seconded: Director Steve Evans

Vote: Motion passed unanimously (7)

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

**H. ACTION ITEMS**

**H.1 Acceptance of Recommendation from the STF Advisory Committee for Approval of Applications for FY2017 Section 5310 and STF Grants** **6:44 PM**

Staff report: Tanya DeHart, Chair of the STF Advisory Committee, described the process the STFAC went through (from pages 9-14 of agenda) to approve three applications (on pages 15-70) for Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) and one application for STF grant program funds to bring to the



Board with the STFAC's recommendation for the Board's approval.

**Motion:** Moved to approve the applications for the federal Section 5310 and STF grants as shown in Attachments C through F and as recommended by the STF Advisory Committee; and further moved to authorize the General Manager to enter into agreements with Salem Health for their proposed project and to proceed with the federal application for FFY16 5310 funding. The remaining STF dollars should be allocated to the CARTS operating budget.

Table 1. Summary of Projects in Section 5310 and STF Applications

Applicant	Project Description	Grant Request	Match	Total	Total Allocation
Salem-Keizer Transit	RED Line Preventative Maintenance	\$ 14,400	\$ 3,600	\$ 18,000	
Salem-Keizer Transit	RED Line Purchased Service	100,816	25,204	126,020	
Salem-Keizer Transit	Mobility Management	108,817	27,204	136,021	
<i>Section 5310 Total</i>		\$ 224,033	\$ 56,008	\$280,041	\$ 224,033
Salem Health	Transportation Coordinator	32,000	-	32,000	
<i>STF Total</i>		\$ 32,000	-	\$ 32,000	\$ 32,599

**Motion by:** Director John Hammill  
**Seconded:** Director Kathy Lincoln  
**Vote:** Motion passed unanimously (7)

**H.2 Approval of IGA No. DASPS-107420-16 with State of Oregon Department of Administrative Services-Fleet and Parking Services 6:46 PM**

**Staff report:** Allan Pollock reported on the groundwork that went into restoring funding for the state employee bus pass program and the Route 15X/Airport Road Park & Ride Express (formerly known as Route 20) from pages 71-100 of the agenda. The intergovernmental agreement is for a period of five years beginning July 1, 2017. It will provide funding for the Airport Park and Ride Express, and rides for state employees assigned within a designated service area. The State will pay the District \$650,000 during the first year of the program; and each year thereafter. Funding will increase a minimum of two percent and a maximum of five percent based on actual costs. The District conducted a Title VI analysis (pages 91-100) and found no Disparate Impact or Disproportionate Burden associated with the restoration of Route 15X and has agreed to provide the service every 15-minutes during peak periods and 30-minutes during non-peak periods, in accordance with the IGA. The District anticipates recapturing a large base of commuter employees that was lost when the State's employee bus pass program ended in 2009 due to budget cuts.

**Comments:** Director Kelley noted there are potential cuts in the State's upcoming budget. She asked if funding for this program will need to be appropriated by the legislature. Mr. Pollock responded that it will and staff will continue to work with the legislature on this program. There will be quarterly statements to report on ridership and other activities.

President Krebs advised that this service is paid for by the State for Capitol Mall employees to alleviate congestion into the downtown area and the parking needs. Other employers can participate in this program by contacting the District office. The employee bus pass can be used on all fixed route buses that includes the 1X Route; but not the Route 2X to Grand Ronde which

is a contracted service.

Motion: Moved to approve Intergovernmental Agreement No. DASPS 107420-16 with the State of Oregon Department of Administrative Services-Fleet and Parking Services; and authorize the general manager to sign the agreement.  
Motion by: Director Kathy Lincoln  
Seconded: Director Steve Evans  
Vote: Motion passed unanimously (7)

### **H.3 Select Board Member to Review the Compilation of the General Manager's Comprehensive Performance Evaluation**

Staff report: Paula Dixon explained the procedure for the general manager's performance evaluation and the duties of the board member chosen to review the compilation of evaluations from page 101 of the agenda.

Motion: Moved to nominate Director Lincoln to review the compilation of the general manager's comprehensive performance evaluation.  
Motion by: Director Jerry Thompson  
Seconded: Director Marcia Kelley  
Discussion: Director Lincoln accepted the nomination. Nominations were closed.  
Vote: Motion Passed Unanimously (7)

## **I. INFORMATION ITEMS - None**

## **J. REPORTS**

### **J.1 Performance – Third Quarter**

**6:45 PM**

Staff report: Matt Berggren reported on the performance measures for the third quarter of fiscal year 2016 from pages 103-118 of the agenda. Revenue hours and miles for fixed route service increased from fiscal year 2015. The average daily revenue hours were 642.7, a five percent increase that included fifteen daily revenue hours for the West Salem Connector. The average daily revenue miles were 8,758.6, a 7.8 percent increase. The average daily boarding at 11,884 decreased by 13.7 percent and is a trend that staff has noted since the September 8, 2015 major service change.

Consultant, Jarrett Walker & Associates (JWA) analyzed the boardings drop and concluded that the drop in ridership was largely due to a combination of decreased transfers between routes and the large decreases in gas prices.

CherryLift saw a decrease of 11.8% in boardings per day. The average boardings on CARTS deviated routes was down 12.6%; down 15.6% on the zone routes; and down 22.6% on the Dial-A-Ride. The RED Line Dial-A-Ride increased by 7.8%. The RED Line Shopper Shuttle decreased by 0.7%.

### **J.2 Rideshare – Third Quarter**

**7:00 PM**

Staff report: Roxanne Rolls gave the third quarter report for the Cherriots Rideshare Program from pages 119-124 of the agenda. The Rideshare staff collaborated with the Valley Vanpool partners on an outreach and education campaign. Staff participated in five 45-minute presentations to students at Stephens Middle School as part of their college preparatory program called *AVID*. Rideshare staff also hosted a table at a State-sponsored *Green Team* event. The first 1,000

*Wander Walks Downtown Salem* maps have been distributed; the same amount will be reordered to ensure adequate stock for other outreach events.

Recommendations that remain active in Rideshare's first year of their strategic plan include refreshing its color palette, program name and logo; building a new one-stop-shop web site; conducting an employee transportation coordinator survey; and reallocating staff responsibilities.

### **J.3 Finance – Third Quarter**

**7:07 PM**

Staff report: Wendy Feth gave an account of the third quarter for fiscal year 2016 from pages 125-131 of the agenda to include charts on pages 132-134 -

- Passenger Fares continue to underperform. The District received more than the projected Property Tax collections and Miscellaneous Revenue (due to an unbudgeted insurance dividend reimbursement).
- Interest rates on investments were 179 percent of the projected amount and interest rates are increasing.
- The General Fund is under budget in all appropriation levels.
- The General Manager/Board of Directors Division exceeded 75 percent of its annual appropriations due to the higher than anticipated cost associated with the ballot measure. The District will propose a budget appropriation transfer at the June Board meeting to cover these costs.
- The Finance Department exceeded 75 percent of its annual appropriations due to NTD certification costs and procurement consulting and costs for temporary help. Any potential budget overage will be covered by other Administration appropriations that will not be spent.
- The overage for the operation of the West Salem Connector will be covered with other Operations appropriations that will not be spent.
- Only one program in the Transportation Program Fund exceeded 75 percent of the annual budget. Mobility Management spent 82 percent due to higher personnel expenses and Garten Services costs for Transit Ambassadors on the downtown transit center at Courthouse Square. Any potential budget overage will be covered by other appropriations that will not be spent.
- The Capital Projects Fund is at 19 percent of the approved budget. Many of the capital projects are still in the planning or procurement stages and will be carried forward in the proposed budget for fiscal year 2017.

### **J.4 Board Subcommittee Report**

**7:15 PM**

Board members are appointed to local, regional and/or national committees; and may present testimony at public hearings on specific issues on behalf of the District as the need arises.

Board members inform the Board of the issues discussed in the committees listed on page 135 of the agenda as they relate to transit and the District. Minutes for the external meetings can be found on the agencies websites.

Minutes of the Board's April 11, 2016 Work Session on pages 137-140, and minutes of the May 3, 2016 STF Advisory Committee meeting were received and filed.

## **K. BOARD AND MANAGEMENT ISSUES**

### **K.1 General Manager**

**7:22 PM**

Mr. Pollock reported on his attendance at the APTA Bus and Paratransit Conference and

being one of the presenters at the *Small Operations Best Practices* workshops. He attended the Community Transit Association of America (CTAA) Annual Meeting in Portland where he spoke during two sessions about *Transit Systems in Oregon That Are Doing It Right* and *Transit in the Future*. He was also elected President of the Salem City Club for the coming year when the Salem City Club will celebrate their 50<sup>th</sup> anniversary.

**K.2 Board President**

**7:25 PM**

President Krebs submitted a written report on his transit-related Board and community service activities since the last board of directors meeting.

**K.3 Board of Directors**

**7:27 PM**

Board members give an account, both verbally and in writing, of their voluntary, transit-related Board and community service activities that may be of interest to the other Board members and to the public. The meetings in May included the Board's work session and regular Board meeting, meetings of the budget committee, neighborhood associations, Chamber of Commerce for Salem and Keizer, Salem City Club, the Iris Festival, and more.

Director Hammill spoke about the dynamic outreach meeting in Stayton held for the regional transportation plan. There were fifteen participants and the discussion was very productive. The next meeting is June 1<sup>st</sup> and will be held at Courthouse Square in the Senator Hearing Room.

Director Lincoln reported on the Oregon Transportation Commission meeting she attended where she gave testimony to remind the Commission to pay attention to the finding regarding transit.

Director Busch attended the Board's executive session regarding labor negotiations. She also invited citizens to the Coordinated Plan workshop at Courthouse Square.

Director Evans met with citizens while waiting on a bench for the West Salem Connector and rode the Connector near the Eola area. He also attended the Iris Festival Recognition Luncheon.

Director Thompson attended meetings at SEDCOR, the Salem Chamber of Commerce and at the Mid-Willamette Valley Council of Governments.

Director Kelley attended an Oregon Transportation Commission dinner and other activities having to do with local elections.

Mr. Pollock announced that the District participated in the Iris Festival Parade as a sponsor and with a decorated bus in the parade. As a result, the District received a trophy. Mr. Pollock thanked the maintenance crew and retired transit operator, Guy Dana, for their decorative work on the bus; and John Welch the transit operator who drove the bus in the parade.

**L. Meeting Adjourned**

**7:43 PM**

Respectfully submitted,

---

Robert Krebs, President

**MEMO TO: BOARD OF DIRECTORS**

**FROM: LINDA GALEAZZI, EXECUTIVE ASSISTANT**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: SCHEDULE OF FY2017 BOARD MEETING DATES**

**Issue**

Shall the Board schedule the regular meeting and work session dates for FY2017 as shown in Attachment A?

**Background and Findings**

According to Rule 11 (Regular Meetings) of the Bylaws, the Board will hold regular meetings on the evening of the fourth Thursday of each month. Rule 11 also requires that when the regularly scheduled Board meeting date falls on a date designated by law as a legal or national holiday, the meeting will be scheduled on another date and time designated by the Board.

The regular November Board meeting date falls on November 24, 2016, Thanksgiving Day. The regular December Board meeting date falls on December 22, 2016. Due to the Thanksgiving and Christmas holidays, past practice has been to schedule eleven meetings in the fiscal year by cancelling the November meeting and rescheduling the December meeting to the second Thursday of the month – December 8, 2016.

Work sessions are normally scheduled on the second Monday of the month. It is recommended that this be continued in FY2017.

**Recommendation**

Staff recommends an eleven meeting schedule for the Board's regular meetings and work session dates for FY2017 as show in Attachment A.

**Proposed Motion**

I move that the Board adopt the schedule of regular and work session meetings dates for FY2017 as shown in Attachment A.

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

**REGULAR BOARD MEETING DATES  
FY 2017**

**Eleven Meeting Schedule**

<b>Work Session</b>	<b>Board Meeting</b>
Monday, July 11, 2016	Thursday, July 28, 2016
Monday, August 8, 2016	Thursday, August 25, 2016
---	Thursday, September 22, 2016
Monday, October 10, 2016	Thursday, October 27, 2016
Monday, November 14, 2016	---
---	Thursday, December 8, 2016
Monday, January 9, 2017	Thursday, January 26, 2017
Monday, February 6, 2017*	Thursday, February 23, 2017
Monday, March 6, 2017*	Thursday, March 23, 2017
Monday, April 10, 2017	Thursday, April 27, 2017
Monday, May 8, 2017	Thursday, May 25, 2017
Monday, June 12, 2017	Thursday, June 22, 2017

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

Regular board meetings are held on the fourth Thursday of each month; except in November and December. There is no meeting in November and the December meeting is held on the second Thursday of the month because of the holidays.

All of the regular board meetings begin at 6:30 p.m. in the Senator Hearing Room at Courthouse Square located at 555 Court Street NE in Salem, Oregon. (Court Street is a one-way street between High Street and Church Street. Three-hour parking is available in front of the building.)

Regular board meetings are also broadcast by Capital Community Television (CCTV) on Channel 21 and can be viewed at any time on CCTV's website. For more information, go to: [www.cctvsalem.org](http://www.cctvsalem.org).

**MEMO TO: BOARD OF DIRECTORS**  
**FROM: LINDA GALEAZZI, EXECUTIVE ASSISTANT**  
**THRU: ALLAN POLLOCK, GENERAL MANAGER**  
**SUBJECT: ANNUAL ALLOCATION OF “DAY PASSES” TO THE UNITED WAY  
OF THE MID-WILLAMETTE VALLEY FOR FY 2016-2017**

**Issue**

Shall the Board approve the annual allocation of “Day Passes” to the United Way of the Mid-Willamette Valley for fiscal year 2016-2017?

**Background and Findings**

On February 25, 1999, the Board adopted Resolution #99-03 a Policy Regarding Donation of Transit Items. According to the Resolution, it is the wish of Salem Area Mass Transit District (SAMTD) to promote the use of public transit, to foster good community relations, and to be a proactive participant in community affairs. Further, in keeping with this goal, it is the District’s policy to respond to and work with businesses and agencies which service clientele in need of short-term assistance in riding the bus. Such services are intended to be provided on a limited basis to meet the extraordinary need on the part of clients, and are not intended to be ongoing.

On August 25, 2005, the Board adopted Resolution #05-04 to amend the donation policy for transit items and formalize the partnership between SAMTD and the United Way of Mid-Willamette Valley in brokering requests for transportation assistance and distribution of “Go Cards.” The *Go Cards* provide two trips or can be traded in by the user for a day pass. The District has subsequently transitioned from the “Go Card” to a pre-loaded day pass that becomes effective at time of activation on the bus.

The United Way of Mid-Willamette Valley developed an application process for their member agencies to request passes. The United Way staff screens member agency applicants for eligibility, and tracks distribution. This process has worked well and those in need of transportation assistance have been provided assistance through member agencies.

Last fiscal year, the Board raised the District’s donation from 4,000 to 5,000 day passes to the United Way for their member agencies to use to assist their clients with temporary transportation assistance. Fifty percent of the annual allocation is distributed in July and January of each fiscal year.

**Recommendation**

Staff recommends the approval of an annual allocation of 5,000 day passes to the United Way of the Mid-Willamette Valley for FY 2016-2017.

**Proposed Motion**

I move that the Board approve an annual allocation of 5,000 day passes to the United Way of the Mid-Willamette Valley for FY 2016-2017.

**United Way of the Mid-Willamette Valley Bus Pass Program  
July 2015 – June 2016**

From July 2015 to June 2016, we had 22 non-profits applying for bus passes. Salem Area Mass Transit District donated 4,400 Adult and 600 Youth passes. United Way of the Mid-Willamette Valley purchased 1,875 Adult and 750 Youth passes.

**Reason for Issuing Passes**

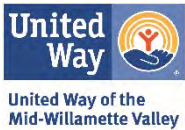
- Health Related Appointments
- Social Service Appointments (DHS, Social Security, Caseworker, etc.)
- Employment Searches or Interviews
- Transportation for Basic Needs (Food, Clothing, Housing/Shelter)
- Transportation to / from New Employment (until 1<sup>st</sup> paycheck)
- Services Specific to an Individual Agency

**Non-Profits with Cherriots Bus Passes**

1. Boys and Girls Club of Salem
2. Catholic Community Services
3. Center for Hope & Safety
4. Congregations Helping People
5. Easter Seals Oregon
6. Family Building Blocks
7. Goodwill Job Connection
8. Kairos (Cadenza)
9. Mano a Mano Family Center
10. Marion-Polk Food Share
11. Medical Foundation of Marion & Polk Counties
12. Mid-Willamette Valley Community Action Agency
13. Northwest Human Services
14. Salem Free Clinics
15. Salem Keizer Coalition for Equality
16. Salem Leadership Foundation
17. The Salvation Army
18. St. Francis Shelter
19. St. Vincent de Paul
20. Shelly's House
21. Union Gospel Mission
22. Women at the Well Grace House

Pass Type	Requested by Non-profit	Granted to Non-profit	Unmet Need
<b>Adult</b>	<b>10,748</b>	<b>6,275</b>	<b>4,473</b>
<b>Youth</b>	<b>2,267</b>	<b>1,350</b>	<b>917</b>





## Bus Pass Success Stories From Nonprofits

June 2015 – July 2016

### Northwest Human Services

Rather than focus on one client specific story, we would like to illustrate the importance of the Cherriots Bus Passes awarded by United Way to NWHHS as a whole.

- In 2015, NWHHS transported over **1,235 homeless** individuals to medical, dental and mental health appointments via our Healthcare for the Homeless van run; **each of these individuals was issued a Cherriots Day Pass** to ensure that they have reliable to transportation for follow-up appointments (at NWHHS or with outside specialists) that may have been scheduled outside of our regular van run hours.
- In total, NWHHS programs distributed **3,933 Cherriots Day Passes** to our patients and clients during fiscal year 2014 - 2015 (combination of UW awards and NWHHS purchased passes).
  - United Way awarded NWHHS approximately **1,056** of those passes (27%!!!)
- **12%** of missed (no-show) appointments at our West Salem Mental Health Clinic are due to lack of transportation. This number is likely higher amongst missed Medical Clinic appointments (data is pending at this time), and is indicative of a need for increased access to transportation.

What do these numbers tell us? That our patients and clients rely heavily on public transportation to gain access to much needed medical, dental, mental health and social service appointments within NWHHS' programs, as well as to get to school, work, and to access other supportive services.

During our 2014 - 2016 Strategic Planning session, the Northwest Human Services Board of Directors and Leadership Team recognized patient and client transportation needs as a major area of focus. We are grateful to community partners such as United Way for helping us ensure that barriers to care are broken down -- and remain that way! -- so that our community's most vulnerable populations can continue to receive the much needed services offered by NWHHS and others.

### Center for Hope and Safety

Rebecca fled from her abuser with her three year old daughter and unborn child to escape the constant verbal and mental abuse she had endured throughout her marriage. When she arrived at shelter, she didn't have access to transportation and had never utilized the bus system before because her husband always kept track of where she was going. The first time we

handed her a bus pass, she was incredibly grateful. Throughout her stay at shelter, she used bus passes every day to secure a stable living environment for her daughter and unborn child, to escort her daughter to pre-school, and to attend all of the appointments she had set up to successfully move forward. Because Rebecca was so far along in her pregnancy, the bus passes enabled her to move forward comfortably.

### **Mid-Willamette Valley Community Action Agency**

A seventeen year-old girl, who we knew to be homeless and living on-and-off the street with her boyfriend, came to our Runaway and Homeless Youth Program case manager and said she suspected she was pregnant. Having no resources, she was given: 1.) One bus pass to go to Planned Parenthood for a pregnancy test (she was pregnant) and 2.) Given a bus pass to access an appointment to a physician for pre-natal care. For homeless teens, lack of access to transportation can often lead to the neglect of urgent or semi-urgent issues, medical and otherwise, and can be a significant barrier to personal well-being.

### **St. Francis Shelter**

Tracy and her family moved into our shelter in March. Tracy was in the Jobs Plus Program while her children were in school. She had an interview at a veterinarian clinic that turned out promising and she was offered a job. She was unable to afford a bus pass until her first pay check. I was able to offer her a week's worth of bus passes so she could get to and from work her first week. Without this option, she would not have been able to accept the job and eventually get out of the shelter into her own apartment.

### **Women at the Well Grace House**

Thank you United Way for your support on my journey to a new life at Grace House. My name is Linda and for the past several months I have resided at Grace House. This is a blessing because during this time I have been learning how to be self-sufficient. The Grace House has been able to make sure that I can get from one appointment to the next by letting me receive bus passes. If for any reason I did not receive these passes I would not be able to make it to my weekly counseling appointments, my doctor appointments, pick up my medications, vocational rehab, social security and many other places I need to go. So I would like to say thank you so much for your bus pass donations as it has helped me immensely.

### **Catholic Community Services**

"Sylvia" came to our office and asked for a bus pass to go to her medical doctor appointment. She struck up a conversation with a staff person who learned that not only had Sylvia recently become homeless, she also was without any familial support, had just left an abusive relationship, she was unemployed, and her only (adult) child had died. The bus pass allowed her to keep her medical appointment; it was too far for Sylvia to walk and she had no money.

**MEMO TO: BOARD OF DIRECTORS**

**FROM: JARED ISAKSEN, FINANCE MANAGER**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: RESOLUTION # 2016-06 - FY2016 BUDGET TRANSFER**

**Issue**

Shall the Board adopt Resolution #2016-06 to amend Resolution #2015-02 adopted by the Board on June 25, 2015; and approve a budget transfer in the FY2015-2016 budget?

**Background and Findings**

Under budget law (ORS 294.463), the District cannot exceed expense appropriations. To cover higher than planned expenses, budget transfers may be made upon approval by the Board of Directors.

These budget transfers move appropriations between categories within a fund and do not increase the legal appropriations for any of the funds. The Board adopted Resolution #2015-02 to adopt the FY2015-2016 Budget by major fund and category on June 25, 2015.

Information about budget transfers in the FY2015-2016 Budget was presented to the Board at their June 13, 2016 work session. The *Materials and Services* expense in the *General Manager/Board of Directors* budget is higher than expected as the cost of the November 2015 special election was more than planned. Resolution #2016-06 will allow for the transfer of sufficient funds to cover those expenses and any unforeseen expenses occurring prior to the end of the fiscal year.

**Recommendation**

Staff recommends a budget transfer be approved for the FY2015-16 budget under the *General Fund* by transferring \$50,000 from the *Operations Division* budget to the *General Manager/Board of Directors* budget to cover the costs of the special election.

**Proposed Motion**

**I move the Board adopt Resolution #2016-06 to amend Resolution #2015-02 that adopted the Fiscal Year 2016 Budget on June 25, 2015; and approve a budget transfer in the *General Fund* of \$50,000 from the *Operations Division* budget to the *General Manager/Board of Directors* budget to cover the costs of the November 2015 special election.**

**RESOLUTION #2016-06**

**AMENDING RESOLUTION #2015-02  
FY2016 ADOPTED BUDGET**

**WHEREAS**, the Salem Area Mass Transit District (“District”) Board of Directors adopted Resolution #2015-02 to adopt the Fiscal Year 2016 Budget by major fund and category on June 25, 2015.

**WHEREAS**, the District follows Oregon Budget Law and the Board of Directors is authorized to transfer funds between appropriation categories under ORS 294.463, and

**WHEREAS**, the Board of Directors has ascertained that it is necessary to transfer within the General Fund, \$50,000 from Operations to General Manager/Board of Directors to cover extra costs associated with the November 2015 special election.

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

**THAT** the Board of Directors hereby adopts Resolution #2016-06 to amend the Budget for Fiscal Year 2016, and

**THAT** the amounts shown below are hereby appropriated as follows, and shall become effective upon adoption of this resolution:

	<u>ADOPTED</u>	<u>ACTION</u>	<u>AMENDED</u>
<u>General Fund</u>			
General Manager/Board of Directors	\$ 641,157	\$ 50,000	\$ 691,157
Operations	18,272,951	(50,000)	18,222,951

**ADOPTED** by the Board of Directors on this the 23<sup>rd</sup> day of June, 2016

**ATTEST:**

\_\_\_\_\_  
President, SAMTD Board of Directors

\_\_\_\_\_  
Secretary, SAMTD Board of Directors

**MEMO TO: BOARD OF DIRECTORS**

**FROM: MATT BERGGREN, PLANNING TECHNICIAN  
STEVE DICKEY, DIRECTOR OF TRANSPORTATION DEVELOPMENT**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: WEST SALEM CONNECTOR PILOT PROJECT**

**Issue**

Shall the Board extend the West Salem Connector Pilot Project for the period of June 2016 through May 2017?

**Background and Findings**

On June 1, 2015, Cherriots began operation of the West Salem Connector—a flexible, on-demand transit service that operates in West Salem and connects people with Cherriots fixed-route buses. Staff has evaluated the first year of the pilot project and provides recommendations for improving service, as shown in **ATTACHMENT A**.

In the Flexible Transit Plan, the student group *Paradigm Planning* expressed that “the purpose of flexible transit is not high ridership but coverage and service to transit-dependent populations that would not otherwise have access to transit.” They went on to recommend that Cherriots explicitly define the goals and objectives of the project, and determine whether those goals and objectives are being met in the evaluation.

*Paradigm Planning* concluded that “overall, the evaluation of success will be specific to the service and the population and will be best informed by qualitative rather than quantitative data.”

If staff were to measure the West Salem Connector purely based on productivity, staff would not deem this service successful. Looking at other metrics, though, there are many ways in which the Connector has been a success. However, there is still more work to be done to improve the service and make it more useful, more popular, and more efficient in order to be considered a permanent service. Because of this, staff recommends the Board of Directors extend the pilot project into a second year.

During the next year, staff will accomplish the following:

**1. Improve Service in West Salem**

Develop and implement a work plan to put into action all the recommendations in this report. Help make the West Salem Connector more productive and useful without increasing resources.

**2. Plan for New Connector Zones**

Explore where new Connector zones could be effective in other areas in the Salem-Keizer community. This planning process will involve extensive public outreach, and will be part of a comprehensive look at the effectiveness of the Moving Forward service change.

### 3. **Explore Technology Options**

The current software contract is set to expire in March 2017. This is a good opportunity to explore all the “on-demand” transit software that has come online in the last year and a half. Staff should ensure the Connector software offers our riders the best possible experience.

#### **Recommendation**

Staff recommends the Board extend the West Salem Connector Pilot Project for the period of June 2016 through May 2017 in order to implement the recommendations for improving service as discussed in Attachment A.

#### **Proposed Motion**

**I move the Board extend the West Salem Connector Pilot Project for the period of June 2016 through May 2017 in order to implement the recommendations for improving service as discussed in Attachment A.**

# West Salem Connector

# A Year in Review



*Cherriots*  
SALEM-KEIZER TRANSIT

















June 2016





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# Introduction

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## The Team

### PROJECT TEAM

**Matt Berggren**, Project Manager and Planning Technician

**Steve Dickey**, Director of Transportation Development

**Ted Stonecliffe**, Long-Range Planning Analyst

**Chris French**, Planning Analyst

**Jolynn Franke**, Administrative Assistant

**SueAnn Coffin**, Contracted Services Manager

**Ron Siegrist**, Customer Service Manager

**Jim Kirkland**, Intelligent Transportation Systems Administrator

**Lorna Adkins**, Marketing Coordinator

**Jenny Furniss**, Marketing and Social Media Specialist

**Gregg Thompson**, Maintenance Manager

### CUSTOMER SERVICE AGENTS

**Alice Moreno, Brittany Palacios, Darlene Williams,  
Melissa Joslin, Pamela Ramirez, Patti Beebe**

### MV TRANSPORTATION

**Brent Standridge**, General Manager

**Jenny Dick**, Operations Manager

**Frank Brown**, Road Supervisor

**Rachel Bolkan**, Road Supervisor

Connector Drivers

### DEMANDTRANS SOLUTIONS

**Roger Teal**, President

**Todd Voirol**, Senior Developer

*A special thanks to the Portland State University student team that made this project possible*

### PARADIGM PLANNING

**Darwin Moosavi, Brenda Martin, Lauren Wirtis,  
Mike Sellinger, CJ Doxsee, Matt Berggren**



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## About Cherriots

This plan was produced by Cherriots. The transit agency provides public transit and paratransit service to the Salem-Keizer community in Marion and Polk Counties located in Oregon's Willamette Valley. Cherriots runs fixed-route service, providing over 3.4 million rides a year and connecting people with places through safe, friendly and reliable service. Cherriots is interested in improving service and increasing accessibility through safety, service excellence, communication, innovation and accountability.



The Cherriots Downtown Transit Center.

## About the Evaluation

The West Salem Connector is an on-demand transit service, which began service on June 1, 2015, as a one-year pilot project. Throughout this report staff evaluate the first year of the project and provide recommended actions for improving service. At the end of the report, staff recommend extending the pilot into a second year and discuss possible next steps.



Connector pickup and drop-off point at the Glen Creek Transit Center.

“

Great service. Got me to where I need to go on time!

”

—Connector Rider



# Service Overview



# What is the West Salem Connector?



**2** WE'LL SEND YOU A PICKUP ETA WHEN YOUR BUS IS ON THE WAY

THE BUS WON'T LEAVE BEFORE THIS TIME

**1** BOOK YOUR TRIP AS LITTLE AS 30 MINUTES IN ADVANCE

CONFIRM YOUR 10-MINUTE PICKUP WINDOW



[book.cherriots.org](http://book.cherriots.org)  
503-361-7551



**3** WALK TO PICKUP POINT

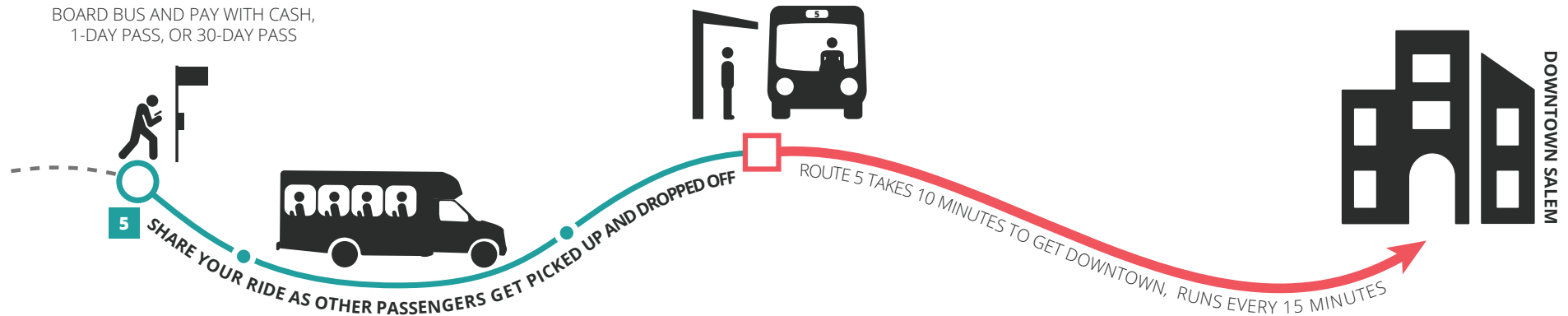


**6 ARRIVE AT DROP-OFF POINT AND WALK TO DESTINATION**

IF AT GLEN CREEK TRANSIT CENTER, TRANSFER TO GO DOWNTOWN

**4 TRACK YOUR BUS WHILE WAITING AT INTERSECTION**

BOARD BUS AND PAY WITH CASH, 1-DAY PASS, OR 30-DAY PASS



The West Salem Connector is a reservation-based, shared-ride, on-demand transit service which runs Monday through Friday, 6 a.m. to 9 p.m. When riders book trips online or by calling, the Mobility DR software by DemandTrans automatically generates the trip manifest. That information is then relayed to the bus drivers via on-board tablets.

Drivers pick up and drop off riders in a 14-passenger cutaway bus. Riders pay using a Cherriots farebox on the bus. The path of the bus changes every hour based on demand. The only scheduled element of the system is at Glen Creek Transit Center, where the bus lays over for five minutes once an hour. This is where riders can transfer to frequent bus service to downtown Salem, as well walk on to the bus without a reservation.

# Challenges serving West Salem with transit

West Salem is a hilly suburban neighborhood. Winding, circuitous streets make it difficult to serve by fixed-route buses. Large buses are limited to running down large arterial streets, which often required riders to walk uphill a long distance to get to or from bus stops. Additionally, West Salem is one of the more affluent areas of the Salem-Keizer area, and driving is the preferred transportation option for most people.



## Disconnected Street Network

The street network is disjointed and irregular, with many cul-de-sacs and few through streets. A bus stop a quarter mile away might require a half mile walk.



## Large Houses and Lots

Large houses on large lots makes everything a little farther apart. This leads to longer walk distances.



## Affluent Residents

West Salem is one of the more affluent areas served by Cherriots. More people can choose between driving and taking the bus.



## Steep Hills

Steep hills make it a challenge to get to far-away bus stops. Even nearby stops can pose a problem.



## Lack of Sidewalks

Sidewalks are key to making the walk to a bus stop pleasant and safe. Without sidewalks, it is difficult to access transit.



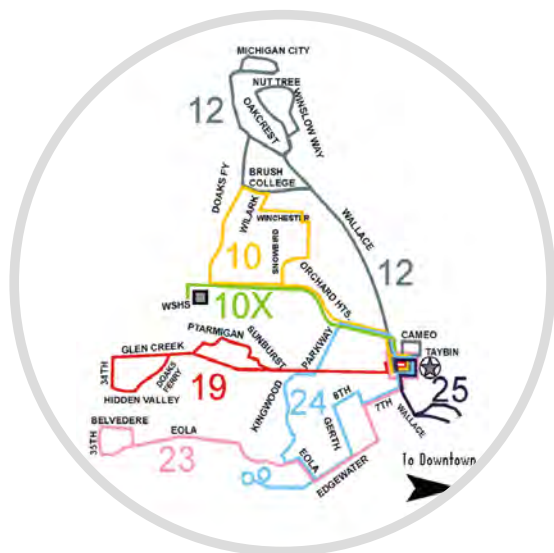
## Auto-Oriented Culture

Driving is the norm in West Salem for most residents. Residents are more likely to have access to vehicles to get around.

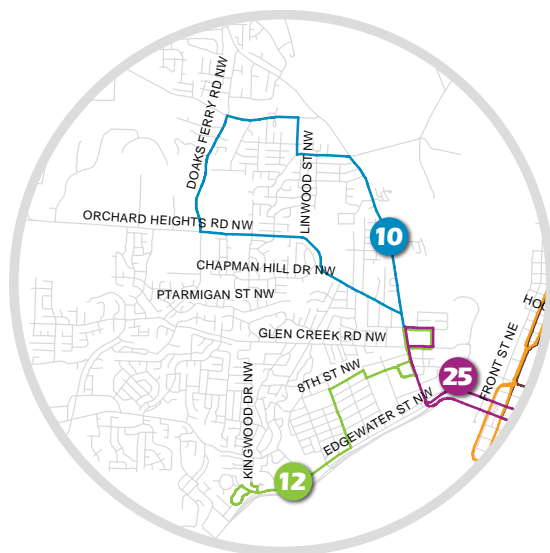




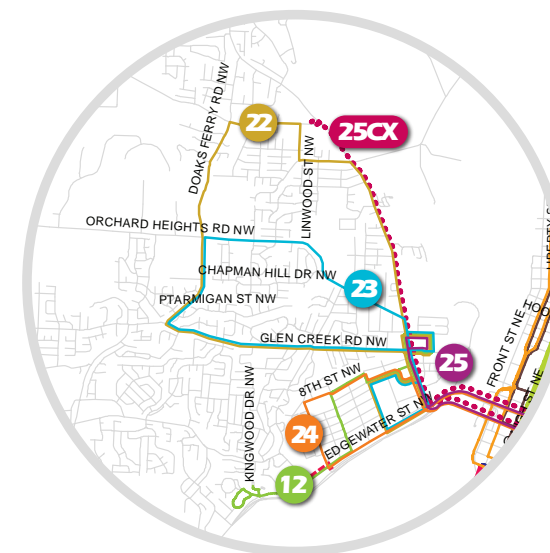
Over the years, Cherriot's staff have made many attempts to provide good service to the people of West Salem. Below are a few snapshots of what service has looked like over the past decade. With each configuration, ridership has remained low. Some West Salem residents have complained that they do not like large, loud buses driving down their streets, especially when they are empty.



2005



2009



2013

The last iteration of service provided in West Salem before the Connector included Routes 22 and 23—large, one-way loops that ran as infrequently as every two hours during the midday. All riders of Routes 12, 22, and 23 were required to transfer to Route 25 at Glen Creek Transit Center to travel downtown. However, Route 25 only ran every hour and sometimes riders were forced to wait for long periods of time.

# Why the West Salem Connector?

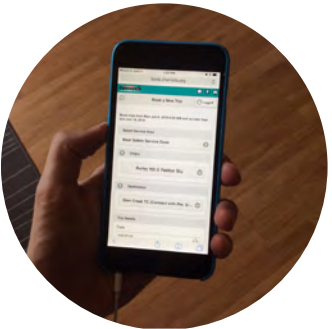
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The West Salem Connector was designed to overcome the challenges of serving West Salem. Cherriots' goal is to provide the residents of West Salem the best possible service given limited resources.



## Smaller buses can traverse neighborhood streets

Large buses were limiting because they could only travel down wide streets. By using smaller 14-passenger cutaways, Cherriots was able to locate pickup and drop-off points closer to people's homes, reducing the distance riders need to walk to use transit.



## Buses only run when neighbors request them

No longer do residents of West Salem see big buses driving past their homes without any passengers. The Connector only comes to a pickup or drop-off point when someone requests it. Points with more requests see more buses per day, and those with fewer requests see less. When there are no requests, the bus waits at Glen Creek Transit center.



## Path changes throughout the day based on demand

Cherriots staff have spent years trying to determine the best path for the bus to take through the hills of West Salem. Now that path is determined by the software based on rider demand. The path of the bus can morph throughout the day to meet the requests of the riders.





## Connects to frequent bus service to Downtown Salem

As part of the Moving Forward project, Connector riders can now transfer at Glen Creek Transit Center to frequent, 15-minute bus service to get to the Downtown Transit Center in Downtown Salem.



## Better service along Edgewater corridor and Wallace Road

Another product of the Moving Forward project has been the introduction of new routes providing 15-minute service along the Edgewater corridor and hourly service along Wallace Road. These new routes are a significant improvement over the routes serving these areas before Moving Forward, and would not have been possible without the Connector providing service in the west hills.

# Project Timeline

Jan 2014

June 2014

March 2015

## Capturing the Ride Study

This project began with the *Capturing the Ride* study—an exploration of flexible transportation options for low density communities in Salem and Keizer. The project sought to provide a service that would meet the communities' transit needs better than the fixed routes.

Over a five month planning process Paradigm Planning—a Portland State University graduate student group—researched alternatives to fixed routes and conducted extensive outreach to the public in Keizer, South Salem and West Salem. Paradigm used a mix of surveys, focus groups, and community events to determine what kind of transit might work best.

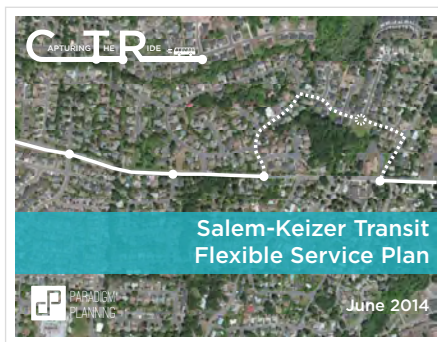
## Further Research and Planning

Once the Board of Directors accepted the plan, Cherriots planning staff began to conduct further research. Staff identified West Salem as the best location for the one year pilot and began work to refine the plan and scope of the project based on the conditions on the ground and technology options.

Staff determined the size of the zone and selected pickup and drop-off points. Once technology options were explored and demoed, staff decided on Mobility DR from Demandtrans. At this point staff selected the name of the service—the West Salem Connector.

## Implementation

For the last three months before the launch of the Connector, staff focused on the implementation. This time period included outreach, promotion and advertising, material development, software configuration, and driver training.



Paradigm Planning's Flexible Service Plan was unanimously accepted by the Cherriots Board of Directors on June 26, 2014.





The West Salem Connector launched on June 1, 2015, as a one year pilot project.



At the time of launch, the service ran concurrently with Route 22 and 23 for the first three months in order to help riders transition. On September 8, 2015, Cherrriots implemented the Moving Forward system redesign, discontinuing Routes 22 and 23 in the process. Additionally, service between the Glen Creek Transit Center and Salem’s Downtown Transit Center was increased from hourly to every 15 minutes.



The Connector operated fare-free for a six month promotional period. On December 1, 2015, the Cherrriots fare was introduced on the Connector, allowing riders to seamlessly transfer to Cherrriots routes.



“

I was very impressed with all of the staff (phone operators, drivers, etc.), and I greatly appreciate the service.

”

—Connector Rider

# About the Riders



# About the Riders

During February - March 2016, staff surveyed riders to learn a little more about them.

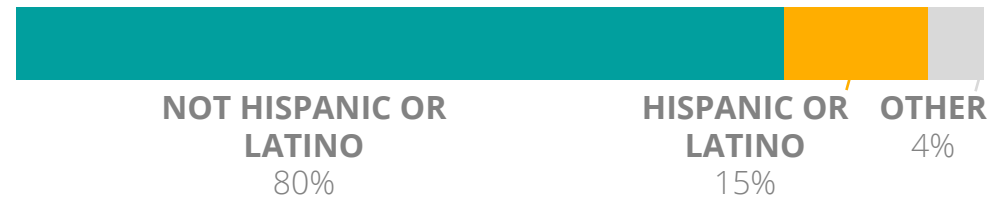


Cherriot staff riding the Connector to lunch.

## Race



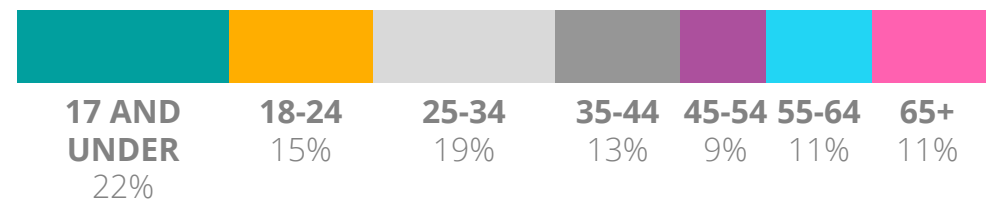
## Ethnicity



## Gender



## Age





## Student



## Access to Car

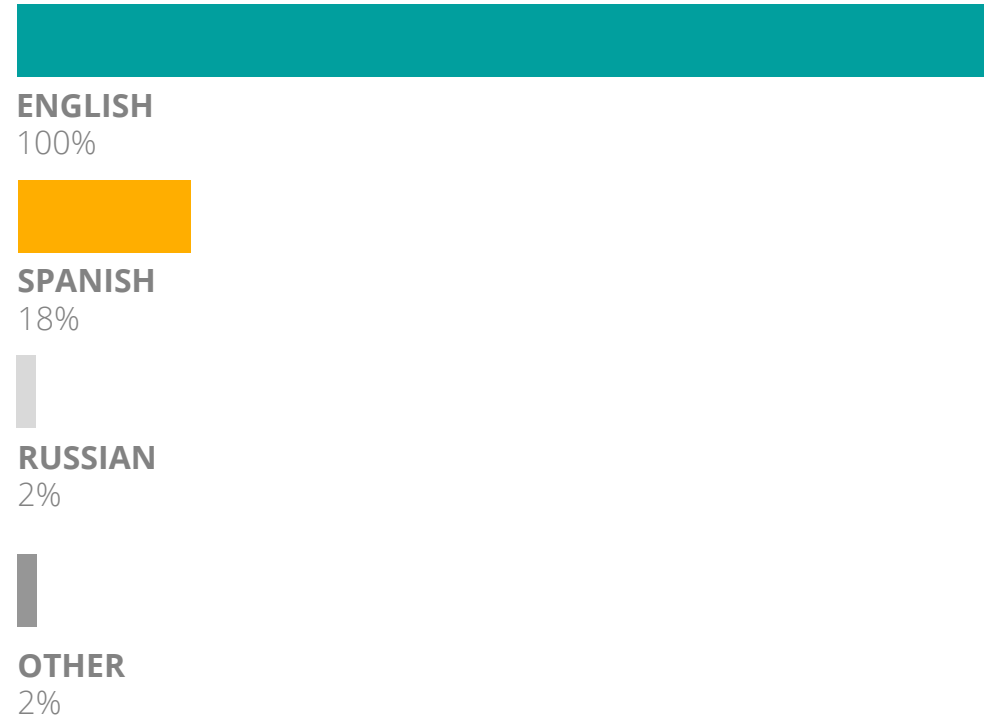


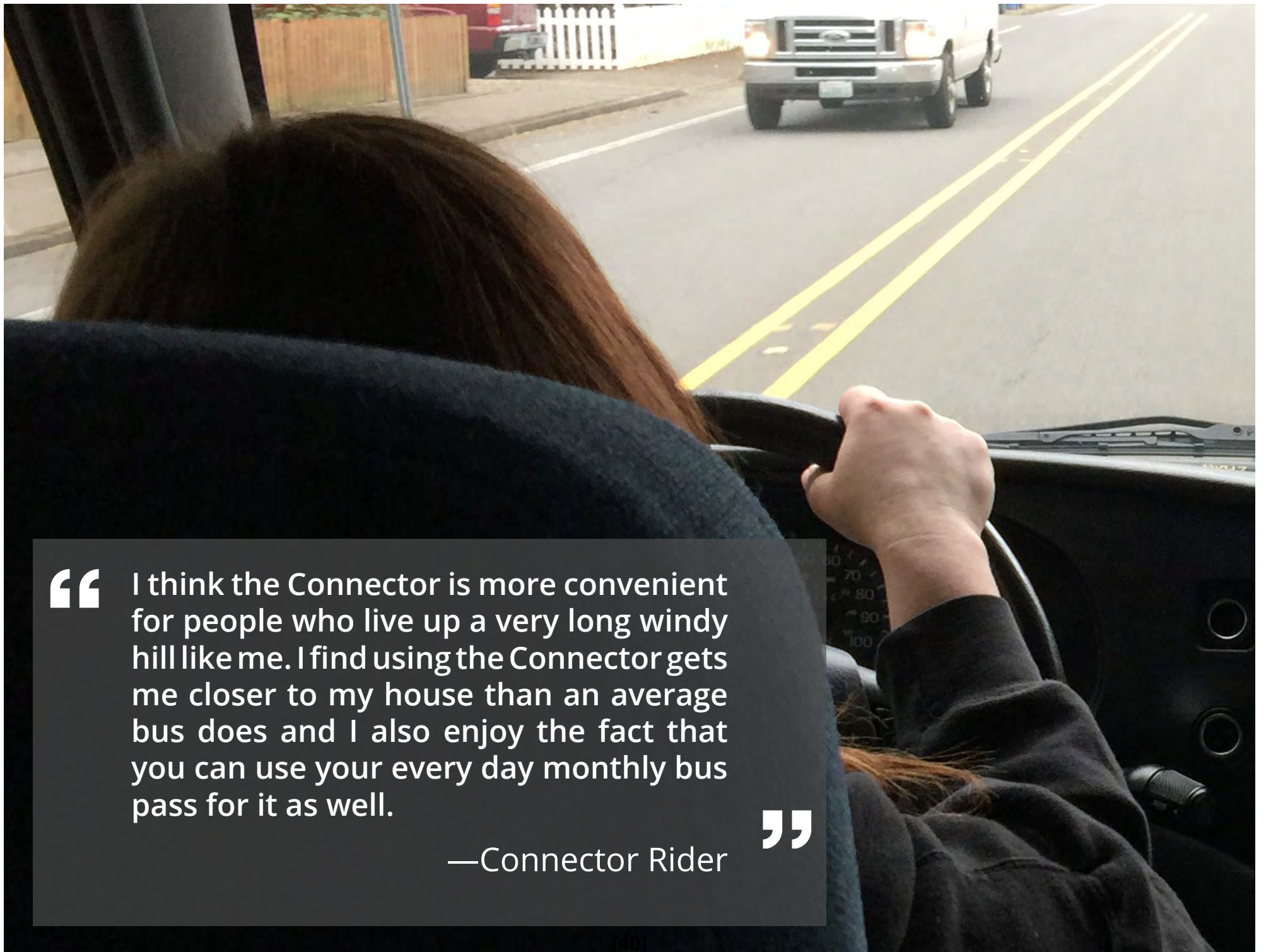
## Booking Method\*



\*Source: Mobility DR report

## Languages





“

I think the Connector is more convenient for people who live up a very long windy hill like me. I find using the Connector gets me closer to my house than an average bus does and I also enjoy the fact that you can use your every day monthly bus pass for it as well.

”

—Connector Rider

# Goal Evaluation



# Goal Evaluation

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## Goals

Staff developed six goals for the Connector pilot project. In the following section, each of those goals are evaluated and discussed.

1

Expand West Salem's access to bus service

2

Integrate with the Cherriots bus network

3

Help riders understand how the service works

4

Provide a safe, comfortable, and reliable experience

5

Create an efficient and cost-effective service

6

Improve service throughout the pilot project



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# Data Collection

Data for the evaluation was collected using a variety of methods.



**Survey 1**  
August 2015



**Survey 2**  
Feb - Mar 2016



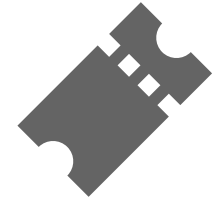
**Mobility DR  
Software  
Reports**



**American  
Community Survey**  
2009-2013



**Comprehensive  
Service Analysis**  
2014



**Cherriots  
Farebox**

## Progress Key

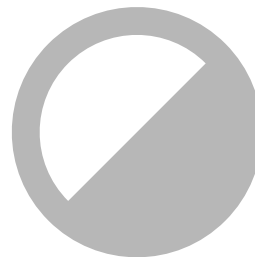
Staff used a number of strategies to meet each of the six goals. In the following section, staff evaluate how effective those strategies were. Each will be assigned one of the following progress indicators.



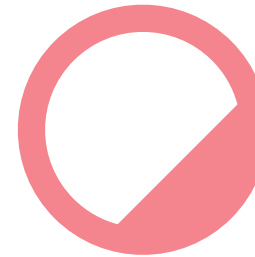
**Succeeding**



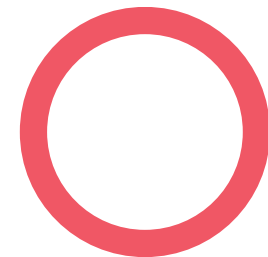
**Almost There**



**Could Be Better**



**Needs  
Improvement**



**Failing**

# Expand West Salem's access to bus service

## Expand service area

The area served by Routes 22 and 23 were bound by Wallace Road to the east, Brush College Road to the north, Doaks Ferry Road to the west, and Glen Creek Road to the south, with an additional area bound by Wallace Road to the east, Edgewater Street to the south, Patterson Street to the west, and 7th Street to the north. In total, this zone covered 1.82 square miles.

The Connector service area expands service all the way south to Eola Drive, and west to Titan Drive. Some parts of the 22/23 are not covered by the Connector, but this is because they are served by new fixed routes (Routes 5/5A and Route 6).

In total, the Connector service area is 2.38 square miles, a 31% increase in area covered by Routes 22 and 23.



### Almost There

The area served by transit in West Salem has been greatly expanded. However, during the pilot project, staff received a number of requests to expand the service area west of Doaks Ferry Road and north of Brush College Road, particularly into the Salemtowne neighborhood.



### Expand service area west and north

Locate new pickup and drop-off points west of Doaks Ferry Road and north of Brush College Road, specifically into Salemtowne. Look into serving the Westview Estates neighborhood as well.



Unchanged service area in grey, removed and replaced by fixed route in red, and expanded service area in green.



# Increase number of people served

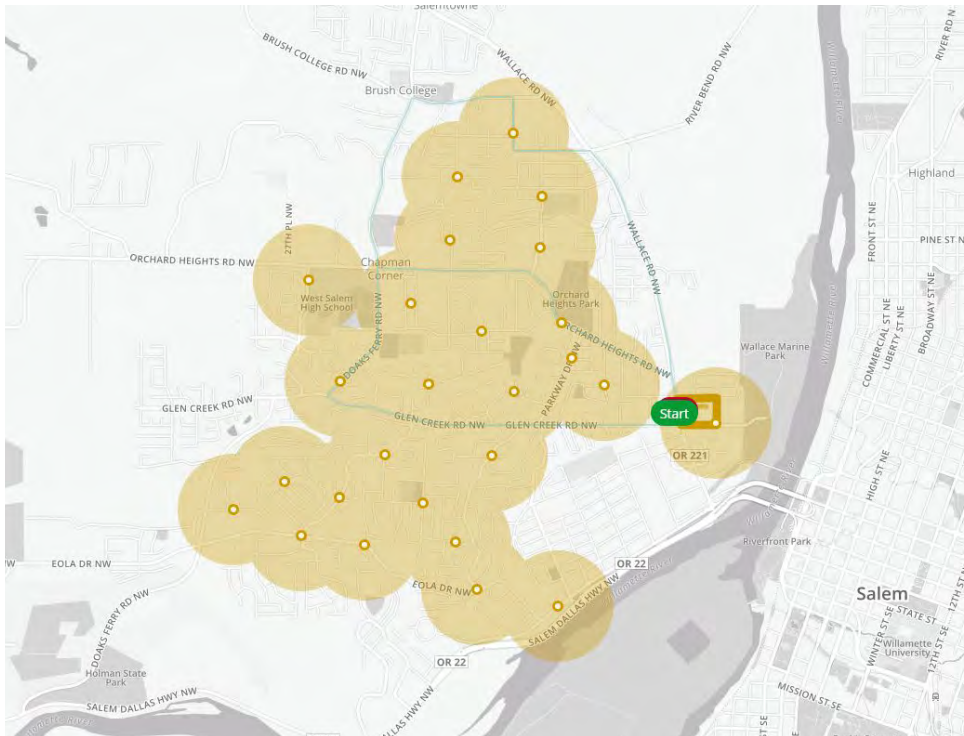
One way to measure access to transit is to look at the number of people living within a 1/4 mile walk of pickup and drop-off points. For the average able-bodied person, this equates to about a five minute walk.

To use Routes 22 and 23, riders often had to walk a greater distance to bus stops on larger arterial streets. Additionally, those living south of Glen Creek Road did not have any service.

By expanding the service area and placing pickup and drop-off points on neighborhood streets, the number of people within walking distance of bus service increased.

Of the sections of Routes 22 and 23 replaced by the Connector, there used to be 7,164 people within a 1/4 mile of a bus stop. Now with the Connector, there are **12,874 people within a 1/4 mile walk of bus service—a 79% increase.**

*Source: American Community Survey, 2009-2013*



Area within a 1/4 mile of the Connector's pickup and drop-off points.



## Could Be Better

The number of people within a 1/4 mile of a pickup and drop-off point is significantly up. However, the hills of West Salem and the 10-minute pickup window still pose barriers to entry.



## Explore curb-to-curb service

Consider modifying the service so riders could book trips to and from their homes, instead of to and from designated pickup and drop-off points. Weigh costs of increased travel times, less trip grouping, and a more complicated booking interface with the benefits of not having to walk or wait in the rain.

# Expand West Salem's access to bus service

## Increase revenue hours and timespan

### Timespan

Before the Connector, Route 22 ran from 6:10 a.m. to 7:35 p.m. (13 hrs, 25 min) and Route 23 ran from 6:45 a.m. to 8:03 p.m. (13 hrs, 18 min).

Throughout the pilot project, the Connector has run from 6 a.m. to 9 p.m. (15 hrs). This is 10 minutes earlier than Route 22 used to run and 57 minutes later than Route 23 used to run, representing an increased timespan of one hour and seven minutes.

### Revenue Hours

Revenue hours are the number of hours the bus is running and available to pick riders up and drop them off. Routes 22 and 23 ran very infrequently—each every two hours in the midday. As a result, their revenue hours combined were just under 12 hours. However, of the portions of Routes 22 and 23 replaced by the Connector, the service only ran for 8.3 hours (assuming a 26% recovery rate).

In contrast, the Connector uses 15 revenue hours, an increase of 6.7 hours or 81%.



#### Almost There

West Salem residents can access service more hours each day. However, a slight spike in ridership between 6 and 7 a.m., as well as some feedback received from surveys, suggests there could be a value of starting the service at 5 or 5:30 a.m.



#### Explore starting service at 5 or 5:30 a.m.

Work with current riders and the greater community to determine if starting service earlier would be a useful investment.





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# Increase availability of bus

It is challenging to compare the availability of a fixed route bus to a bus that runs on demand. Fixed route bus availability can be measured using frequency—the number of times a bus comes by any given stop in a given time period. Routes 22 and 23 ran every hour in the peak, and closer to every two hours in the off-peak.

The Connector, however, does not run on a consistent frequency. If a trip is booked from a given pickup and drop-off point every 20 minutes for an hour and there is room in the schedule, the bus will travel there three times in that hour. Likewise, if a trip is not booked to or from a stop in a given day, the bus will not travel there at all.

More useful benchmarks for on-demand service are the trip denial rate and the average deviation between requested and booked trip times.

## Trip Denial Rate

When riders book a trip, if the software cannot give them their requested time it looks for alternative times. If there is no availability within an hour, the software gives the rider a trip denial. To determine the trip denial rate, staff divided the number of denial trips by the number of total trips booked. The result was a rate of 1%, or 136 trip denials for 12,528 total booked trips.

## Requested Trip Time vs. Booked Trip Time

On average, the difference between a rider's requested trip time and their booked trip time is 2.6 minutes.



### Could Be Better

Although the trip denial rate is low and the difference between requested trip times and booked trip times is very low, there is evidence the software is not effectively grouping trips together. Staff have heard this from both riders and customer service agents. More research needs to be done to ensure our booking parameters are optimized as to maximize availability by grouping similar trips.



### Collect and monitor booking abandonment rate

Start collecting and monitoring the trip abandonment rate to see what times are most popular and when riders are not able to book trips at their desired times. Work with the software provider to determine what constitutes an acceptable number of abandoned bookings.



### Explore Glen Creek TC cycle time options

Work with the software provider to explore requiring riders to book to and from the Glen Creek Transit Center at specified cycle times, either every 30 minutes or every 60 minutes. This would give riders less booking time flexibility, but it should increase the capacity of the bus.

# Integrate with the Cherriots bus network

Design service to facilitate seamless transferring to rest of system

## Transfer Points

Staff placed pickup and drop-off points at the location of three Cherriots fixed-route bus stops: Glen Creek Transit Center, Edgewater @ Rosemont (Safeway), and Wintergreen @ Winchester.

At times staff has considered bringing the Connector downtown. However, with only one bus there is not enough time to do so.



Riders can transfer between the Connector and Cherriots Routes 5/5A at the Glen Creek Transit Center.

## Scheduled Layover

In order to make it easier to transfer from the Connector to Routes 5/5A at Glen Creek Transit Center, staff scheduled a five minute layover at the transit center every hour. Riders wishing to transfer to the Connector can do so at this time without booking a trip simply by walking on.

Glen Creek Transit Center | Bay **F** Stop ID **232**

**WEST SALEM CONNECTOR** book.cherriots.org | 503-361-7551 Monday - Friday  
6 a.m. - 9 p.m.

**Walk-Ons**  
Walk-ons without booking a trip in advance are allowed at Glen Creek Transit Center on the schedule shown. The walk-on window is scheduled once an hour after the Route 5/5A arrives from downtown to make transferring easier.

You can still book a trip to Glen Creek Transit Center at any time throughout the hour as long as it fits into the schedule. Routes 5/5A travel across the bridge every 15 minutes for most of the day.

Downtown Transit Center	Glen Creek Transit Center
6:55a	7:15a
8:15a	8:35a
9:35a	9:55a
10:55a	11:15a
12:15p	12:35p
1:35p	1:55p
2:55p	3:15p
4:15p	4:35p
5:35p	5:55p
6:55p	7:15p
8:15p	8:35p

**Book a Trip**  
Book a trip in advance on your smartphone, tablet or computer. You can also call 503-361-7551.

**Wait at Intersection**  
Arrive at the intersection of your chosen Connector point for the rest of your 15-minute pickup window. Make sure you can see your pickup sign.

**Share Your Ride**  
Riders are allowed to hop on or off at any point along their route.

**Arrive or Transfer**  
When a bus arrives at your destination, you can also transfer to Cherriots at the Glen Creek Transit Center or Safeway to get to downtown Salem.

Scan your trip on the go using your phone with Transit App. Download on iOS/Android for free. [transitapp.com](http://transitapp.com) (Doesn't work for Connector)

Doesn't run Monday through Friday. They do not operate on Saturday, Sunday, or these holidays: Thanksgiving, Christmas Day, New Year's Day, Presidents Day, Memorial Day, Independence Day.

In the event of severe ice, severe bus stops could be temporarily out of service. [cherriots.org/alerts](http://cherriots.org/alerts) • 503-588-2877

No smoking or e-cigarettes in vehicles or on board buses

All buses are equipped with a bike rack. Free bike.

Ask the operator if you need the space reserved for wheelchair.

Rate info: 503-361-7551 | [cherriots.org](http://cherriots.org)

**Cherriots.org**

The shelter schedule at Glen Creek Transit Center notes when the Connector will lay over at that location.



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## Fare Integration

The Connector ran fare-free for the first six months. This was to promote the service and encourage riders to give it a try, but it also made the transfer process to Cherriots more seamless. With the introduction of the fare in November 2015, staff designated the Connector an "auxiliary service" of Cherriots. For the riders, this means the fare structure on the Connector is the same as Cherriots, and all day passes and 30-day passes can be used on both services.



The Connector buses use the same farebox as the rest of the Cherriots fleet.



### Succeeding

Of those surveyed, 74% transfer to Cherriots from the Connector. All in all, 88% of trips start or end at Glen Creek Transit Center, the primary transfer point to Cherriots.

# Integrate with the Cherriots bus network

Use branding and rider materials to communicate link to Cherriots

## Brand Integration

The logo for the Connector was designed to look similar to the Cherriots logo. It used the same font and colors, as well as the cherry icon.



### Almost There

The emphasis on West Salem was important for the launch of the pilot to help riders know where the service operated. As future Connector zones are considered, though, the focus should be more on the integration with the greater Cherriots network.



### Rename service to Cherriots Connector

This will highlight the link between the Connector and the greater Cherriots system. In order to save resources, integrate this change into the upcoming 2016 brand refresh.

## Map, Schedule and Website Integration

Staff designed a foldable schedule for the Connector that fits in the schedule rack with all the other Cherriots routes. The Connector is also located on the foldable system map, on the detailed system map in the transit center lobbies, in the 2015 Ride Guide, and as a route on the Cherriots.org website.



Schedule rack in the Cherriots Downtown Transit Center. The West Salem Connector has a schedule like all the fixed routes.



### Succeeding

The Connector has been successfully integrated into the Cherriots rider materials.

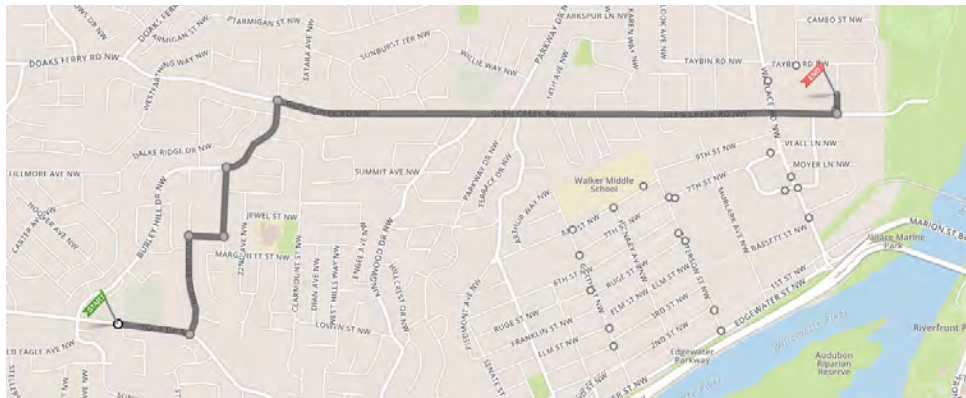


## Trip Planner and GTFS Integration

Many riders use trip planners to discover how to navigate the Cherrlots network. Cherrlots.org has a custom trip planner, which uses the Open Trip Planner platform. Riders also use Google Maps, Transit App, and other trip planning sites and apps.

Staff publish the Cherrlots schedule data in a standard General Transit Feed Specification (GTFS) format, and trip planners read that feed to give riders accurate trip planning results.

Unfortunately, the GTFS standard does not currently support on-demand transit services like the Connector. However, there is a group of transit and technology professionals working on a new standard called GTFS Flex which would solve this problem.



When attempting to plan a trip from Eola Drive and Burley Hill Drive to the Glen Creek Transit Center, the Cherrlots Trip Planner recommends the user walks the entire way.



### Failing

With the launch of the Cherrlots Trip Planner, staff attempted to show Connector pickup and drop-off points on the trip planner map. Although not a full implementation of the current draft GTFS-Flex specification, it would at least show people that there was something in the hills of West Salem for them to use. However, this strategy had a lot of bugs and was eventually pulled.



### Contribute to GTFS-Flex project

Use lessons learned and data from the Connector to contribute to the GTFS-Flex project. Help shape the standard to work for the Connector service model. Once complete, work toward integrating GTFS-Flex into Cherrlots Trip Planner.

# Help riders understand how the service works

## Use simple-to-understand language on all rider materials

Staff used simple-to-understand language on all rider materials. When promoting the service to potential new riders, staff used the tagline **Call or Click, Book your Trip**. The goal was to make it clear that an advanced reservation was required to ride, and that riders could either call or go online to book their trip.

For other rider materials, such as the webpage and the print schedule, a more detailed how-to-ride diagram was used. This clearly spelled out the process for booking a trip, and told riders what they could expect on their trip.



The bus wrap invites residents of West Salem to call or click to book their trip.

## How to Ride



### Book a Trip

Book a trip in advance on your smartphone, tablet or computer at [book.cherriots.org](http://book.cherriots.org). You can also call **503-361-7551**.



### Wait at Intersection

Arrive at the intersection of your chosen Connector point by the start of your 10 minute pickup window. When we're on our way, we'll notify you via text, call or email (your choice).



### Share Your Ride

Rides are shared with your neighbors in West Salem. Other riders will be picked up and dropped off along your route.



### Arrive or Transfer

After a short ride, arrive at your destination. You can also transfer to Cherriots at the Glen Creek Transit Center or Safeway to get to downtown Salem.

This how-to-ride infographic is used on the Connector webpage and print schedule, as well as the shelter schedule at Glen Creek Transit Center.

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## Include transition period with Routes 22 and 23

Although the Connector launched on June 1, 2015, Routes 22 and 23 were not discontinued until three months later. This transition period was critical for ironing out the bugs in the system. It also gave riders an opportunity to get registered and try the Connector before they made the transition permanently.

Staff placed notices on the poles of all Routes 22 and 23 bus stops being discontinued alerting riders of the upcoming changes. This gave riders time to call in and ask questions about the new service.



A Connector bus with a Cherriots bus on a now-discontinued route in the background.



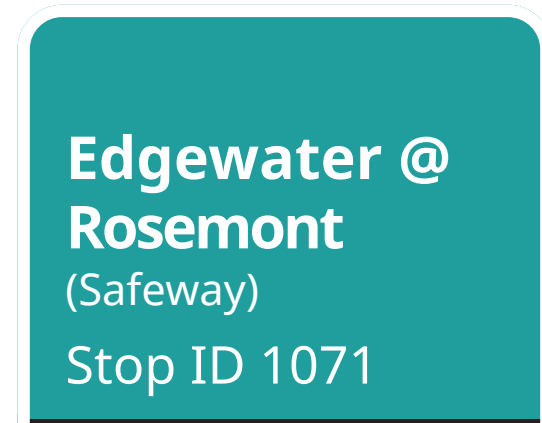
# Help riders understand how the service works

## Use explanatory pickup and drop-off point signage

Pickup and drop-off points are different from bus stops in two ways:

1. Buses can approach from any direction, so riders may be expected to cross the street.
2. Buses will not come to the pickup and drop-off point unless a trip is booked, with the exception of the Glen Creek Transit Center.

To prevent riders from waiting at a pickup point without booking a trip, only to eventually realize the bus was not coming, staff used sub-signs to explain how to book a trip. The signs make it clear “the Connector will stop here only if you book a trip.”



To book your trip    
**CALL OR CLICK**  
**book.cherriots.org**  
503-361-7551

The Connector will stop here only if you book a trip.







## Succeeding

To measure whether riders understood how the Connector worked when they went to ride it, Cherriots staff asked riders what, if anything, was unexpected about their trip or booking. Of the 50+ survey respondents, most did not reply. Of those who did, most responded with “no” or “nothing.” Other comments included “only rode with one other customer once” and “occasional delays.” However, there were no comments that would imply riders did not understand how the service worked.



# Provide a safe, comfortable, reliable experience

## Provide a variety of options for booking a trip

The Connector was launched with the ability to book trips online using any device with a web browser, including smartphones, tablets, laptops and desktops. Riders can also call in and have a customer service agent book on their behalf. If they are at the Downtown Transit Center, they can book their trips in person. Additionally, riders can walk on at Glen Creek Transit Center without a reservation.

When surveyed, 90% of respondents rated the booking process “good or very good.”



A Cherriots customer service representative helps a rider book a trip on the West Salem Connector. Customer Service is open from 6:15 a.m. until 8:45 p.m., Monday through Friday.



### Almost There

Although riders overall seem pretty happy with their booking options, the software still lacks an iOS and Android app. This could potentially turn some people away from the service by adding a barrier to booking.



### Develop iOS and Android Smartphone App

Work with the software provider to develop smartphone app for iOS and Android in the short term. Write this requirement into upcoming software RFP.

“ It has been quite simple for me to book online. ”

—Connector Rider

## Place pickup and drop-off points in safe, convenient locations

Once staff determined the size of the zone, they used mapping software to generate a list of potential pickup and drop-off points. The software placed the minimum number of points required to ensure most houses within the service zone were within a 1/4 mile walk (a five-minute walk for the average able-bodied person).

From there, staff took that list and visited each site to ensure it would be a safe place to stop. Staff changed the location of some pickup and drop-off points to ensure safety and accessibility, and also prioritized locations near fences and hedges in order to respect the privacy of local residents.



### Succeeding

Some riders have expressed interest in new pickup and drop-off points outside of the current service area. However, there have been very few requests for moving the locations of current pickup and drop-off points. In the rider surveys, there were no safety issues expressed regarding the current point locations.



Cherriots and MV Transportation staff finalizing locations of pickup and drop-off points in West Salem.



# Provide a safe, comfortable, reliable experience

## Deliver advance notifications with pickup ETAs

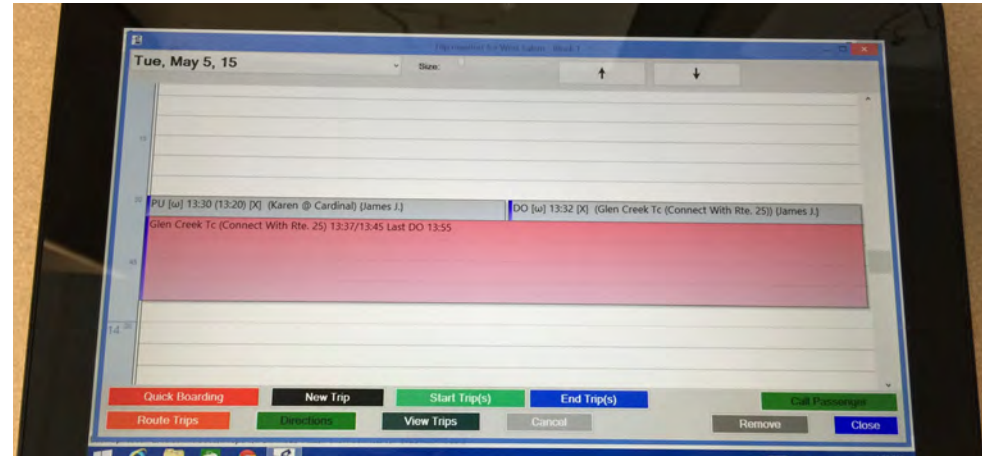
The system was designed to deliver estimated time of arrivals (ETAs) to riders ten minutes before their bus arrived. Riders without technology are expected to be at their pickup point by the start of their 10-minute pickup window. However, for those with cell phones, text messaging or email, the advance notifications give riders a better sense of when the bus is going to arrive.

Unfortunately, for much of the pilot project the advance notifications have been largely inaccurate. There are a number of factors that have caused this, the primary culprit being the driver interface. Up until May 2016, the driver interface was calendar-based instead of task-based. Drivers were able to see all their pickups and drop-offs on the screen, but it was not always clear when they were expected to be at each pickup and drop-off point and in what order they should pick up and drop off riders.

This has led to a lot of issues with the accuracy of the estimated times given in the advanced notifications. On the whole riders have learned not to trust the estimates.

“ I think that the 5 minute eta text that I receive should be WAY more accurate and on time.

—Connector Rider



The old driver interface was calendar-based, and it was often unclear when a driver was expected to be at each pickup and drop-off point.



The new driver interface is task-based and has turn-by-turn navigation. It tells the driver exactly when to be at each pickup and drop-off point and how to get there.



## Needs Improvement

With the launch of the new task-based, turn-by-turn driver interface, pickup ETAs are much more accurate, and riders can now be confident their driver will not leave before the time on the notification. However, there is still a lot of testing to complete and bugs to iron out.

This issue was the primary reason why promotion has been limited in the second half of the pilot project's first year. It is challenging to attract new riders when the technology cannot be relied upon.



## Ensure accuracy of pickup ETAs, then promote

Over the next few months, ensure the new advance notifications—and the new driver interface on the whole—are working and reliable.

Once confirmed, promote the newly improved notifications, and explain to riders the benefits of not having to be at their stop for the full 10 minute pickup window. Use this to bring former riders back into the fold, as well as to attract new riders.



# Provide a safe, comfortable, reliable experience

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## Ensure the Connector is reliably on time

For Cherriots buses with fixed schedules, a bus is considered early if it leaves before the scheduled departure time, is considered on time if it leaves less than four minutes after the scheduled departure time, and is considered late if it leaves four minutes late or later.

Staff measure on-time performance for the West Salem Connector in a different way. Riders are given a 10-minute pickup window when the bus can arrive. As long as the bus arrives within that window, it is considered on time. If it arrives later than that window, it is considered late. If the driver marks a passenger as a no-show before the start of the pickup window, that is categorized as an early departure.

“ I never book in the afternoon any more because I can't trust them to be there at the right time. Have a more set time to know when to get to the stop.

—Connector Rider

### On-Time Performance

In total, 93% of trips for the Connector are on time and 7% are late. Only a handful of trips have had early departures, and that problem was fixed with the new driver interface, which prevents drivers from no-showing passengers early.

### No-Show Rate

The Connector has a very high no-show rate. Of all trips that were dispatched, 11.2% resulted in no-shows. This indicates there is a disconnect between riders' expectations for when the bus will arrive and the software's expectations. What riders perceive as on time might be vastly different from what is considered on time by staff.

### Hardware Reliability Issues

The software provider recommended consumer-grade tablets to be used for the Connector because of their cost relative to durable tablets used by Denver RTD. This proved to be a mistake, as the tablets had charging issues from day one. After a couple months of sporadic issues, the tablets all but failed. Staff quickly purchased new durable tablets to replace them.

At the time, this disruption caused a lot of delays and made it difficult to ensure good on-time performance.

Recently, staff has also run into issues with the SIM cards in the new tablets failing, which has caused similar issues with on-time performance.



The consumer-grade Dell Venue 11 Pro tablets are relatively inexpensive, but they had charging issues which started on the first day and only got worse.



The Panasonic Toughpad FZ-G1 tablets are three times the price of the consumer-grade tablets, but they are built to last.



### Almost There

The percent of trips on time is meeting expectations. However, there might be better ways to measure on time performance. Also, the high rate of no-shows indicates there may be an issue with rider expectations for when the bus will arrive.



### Continue to improve new driver interface

Work out all the bugs in the new driver interface. Ensure it is providing the best routing and accurate time estimates.



### Develop new standard for on-time performance

On-time performance should be measured by how late the bus was after the rider's pickup ETA. Also include drop-off time in the standard.



### Create backup network plans

Have multiple SIM cards on hand from Verizon and T-Mobile. Consider purchasing a wireless hotspot device to be used as a backup.



### Design and document new failover plans

Create new failover plans that customer service, IT, drivers and dispatchers can use in the case of a technology failure.



# Provide a safe, comfortable, reliable experience

## Employ friendly, pleasant drivers with excellent customer service skills

Both times staff surveyed riders, the respondents consistently gave high ratings to the courteousness of the Connector drivers. Of the 50 riders who responded to a survey conducted in February-March 2016, 90% of respondents rated the courteousness of their drivers as “good” or “very good.”

Comments include:

- “Always helpful and nice”
- “Very kind and courteous”
- “Both drivers were exceptional and very personable”



### Succeeding

It is encouraging to hear riders are so happy with the courteousness of their drivers. The credit goes to MV Transportation, which employs and trains the Connector drivers.



MV Transportation employee learning to use the Connector tablet.



# Fix up retired paratransit vehicles to be safe, comfortable and reliable

Many riders find the buses to be uncomfortable. One rider described the buses as “very clunky and kind of scary.” This type of vehicle tends to be loud and rickety.

Additionally, both Connector vehicles (the primary and the backup) consistently broke down throughout the first year of the pilot. Maintenance staff went so far as to nickname a bay in the shop the “Connector bay” since it was common for one of the vehicles to be there.

The buses have been so unreliable because of a combination of their age and mileage. **Bus 1819** is a 2002 model with 296,000 miles, and **Bus 1821** is a 2003 model with 254,000 miles.

When buses would break down out in the field, it would sometimes result in delayed or missed pickups.



The inside of a Connector bus.



## Needs Improvement

The current vehicles are safe, but they are not as comfortable and reliable as they should be.



## Procure new vehicles as soon as possible

Determine a source of revenue for procuring new vehicles for the Connector if the pilot continues. In the interim, consider using more recently retired paratransit vehicles as a stopgap.



I hope to see it upgraded at some point in the future though because the busses are very clunky and kind of scary, especially for first timers (some of my friends) who don't know what its like to ride those small buses like that.



—Connector Rider



# Provide a safe, comfortable, reliable experience

Limit the amount of time riders spend on the bus

## Max Ride Time

The Connector software limits the amount of time riders will spend on the bus. When booking a trip, riders are given a “max ride time.” This is the maximum amount of time the software will allow riders to spend on the bus in any given trip. The max ride time is calculated by taking the direct drive time (how long it would take to drive directly between a rider’s pickup and drop-off points), multiplied by 2.5, plus five minutes.

For example, if a rider was traveling from Kingwood @ Lefor to Glen Creek Transit Center and the direct ride time was 4 minutes, the rider's maximum ride time would be  $4 * 2.5 + 5$ —or 15 minutes.

## Average Time on Bus

On average, riders spend 10 minutes on their Connector bus. This is considerably lower than the maximum ride time for most trips.



### Almost There

The average amount of time riders spend on the bus is very low. However, there are a few factors that sometimes lead to long ride times. The first is walk-ons. When too many riders walk on at Glen Creek Transit Center without reservations, it might be impossible to limit each rider's ride time to what the system requires.

The second issue comes with drivers picking up and dropping off riders out of order, which may cause riders to spend more time on the bus than the system expected. This practice should be taking place less frequently now with the new driver interface.



### Require drivers to pick up and drop off in order

With the new driver interface, the order drivers should pick up and drop off passengers is much more clear. However, there is still a culture of drivers determining the trip order themselves. Staff should work with drivers to change this culture so riders are picked up and dropped off in the order the software plans.

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# Ensure riders are interested in riding the Connector again

When staff asked riders how their overall experience on the Connector had been, 84% had a “good” or “very good” experience. Around 14% had a neutral experience, and one rider had a poor experience.

Staff also asked everyone who had a Connector account whether they planned to ride the Connector again. Of the 50 riders who responded, 76% said they planned to ride the Connector again and 18% said they were unsure. Only 6% of riders said they were not planning on riding again.



## Almost There

A large majority of the riders who responded to the survey said they planned to ride again. However, there might be a bias in the survey toward those who still continue to ride. Of those who responded, there are a sizable group of riders who had a neutral experience on the Connector and are unsure if they will ride again.



## Follow-up with former riders

There have been a number of bugs that have been squashed in the software, and processes that have been improved over the first year of the pilot. Along the way, it is likely some riders have had frustrating experiences, which have led them to stop riding. Staff should follow up with these riders to promote the improvements that have been made to the service.



# Create a more efficient and cost-effective service

## Promote the Connector to all residents of West Salem

As the Connector launched, staff promoted the new service in a variety of ways. The strategy was to increase ridership to best take advantage of the resources being spent on the Connector.

### May - June 2015

*Target audience:* Entire community/West Salem residents/  
business community/current riders

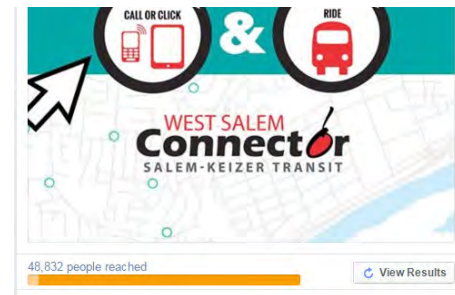
*Message:* Launching new service, try it for free

### Giveaways and Events

- Branded giveaways: Connector sunglasses, Lego phone accessory sets and “scrunch” maps
- Giant Connect-4 game to use at outreach tables
- Showbiz event table
- Safeway and Starbucks outreach event in West Salem

### Advertisements

- West Side News ads (May - December 2015)
- Newspaper articles (West Side News, Statesman Journal, SEDCOR Enterprise Magazine, OPB & 17 NPR affiliates across the nation)
- Every Door Direct Mail in West Salem
- Geo-fenced mobile ads



## Rider Promotion

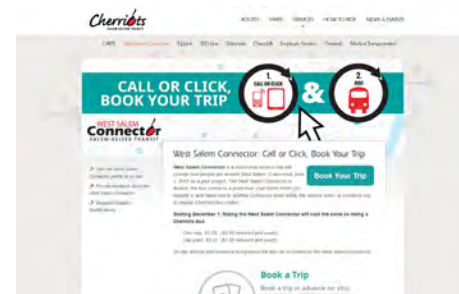
- Email blast to Cherriots subscriber list
- Social media posts (Facebook and Twitter)
- Fliers on the bus
- Header cards
- Transit center lobby information board advertisement



## Succeeding

Staff invested a lot of time and energy into promoting the Connector to current Cherriots riders, potential riders in West Salem, and the greater Salem and Keizer community. Promotion was not limited to just one medium—instead, it included print, digital, and in-person elements in order to reach the greatest number of people.

- Sandwich boards at future connector points before signage
- Fliers to houses near Connector points
- Web page promotion
- Distinctive bus wrap
- Posters and fliers distributed to businesses throughout West Salem



# Create a more efficient and cost-effective service

## Continually promote the Connector throughout pilot

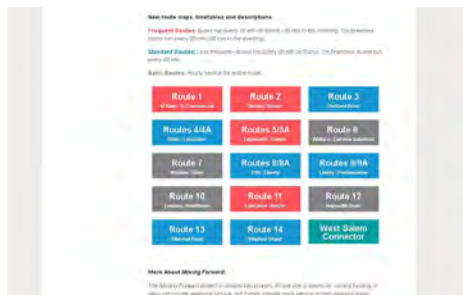
Staff continued to promote the Connector as the Moving Forward system redesign went into effect, and as a fare was introduced on the Connector.

### July - October 2015

*Target audience:* Current bus riders

*Message:* The Connector is replacing some regular bus routes in West Salem—plan ahead for changes.

- Web links and info on Moving Forward page
- First survey to Connector riders
- Shared Connector info at thirteen Moving Forward outreach events throughout Salem and Keizer
- Promotion on Cherriots home page
- Connector info in Ride Guide
- New Connector schedule that fits schedule rack
- Email to all West Salem High School students
- Temp marketing assistant rode West Salem buses and talked to people about Connector service



## November - December 2015

*Target audience:* Current bus riders

*Message:* We're introducing a fare on the Connector

- Header cards
- Email blast
- Social media
- Transit center lobby information board advertisement



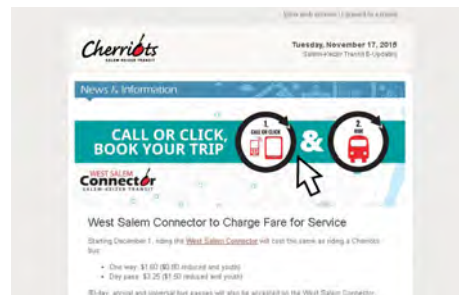
### Could Be Better

Staff continued promoting the Connector throughout the first half of the pilot project. During the second half, however, promotion slowed while staff waited for the new version of the driver interface to be launched. Staff decided to hold off on promoting the service to new riders because of issues the old interface was causing.



### Start new phase of promotion

Now that the new driver interface has been launched, start a new round of promotion. Highlight the new guaranteed pickup estimated time of arrival. Reach out to both new potential riders and riders who stopped riding because of issues with the software.

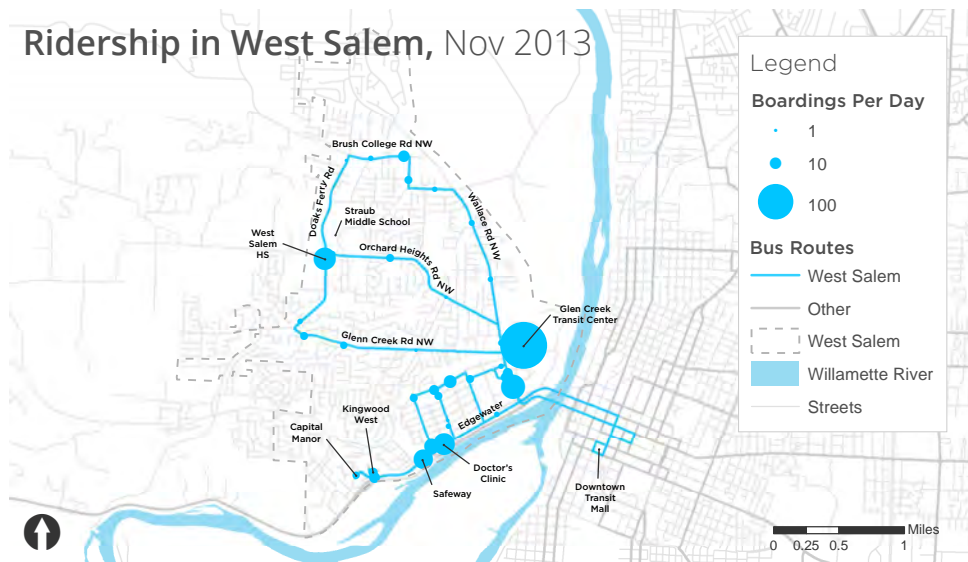


# Create a more efficient and cost-effective service

## Increase total boardings over the former Routes 22 and 23

It is difficult to make a direct comparison between the boardings on the former Routes 22 and 23, and the Connector. This is primarily due to the fact that many sections of Routes 22 and 23 were replaced by Routes 5/5A, Route 6, and the Route 6 tripper (leaving from West Salem High School). Additionally, data about boardings at the Glen Creek Transit Center include ridership from other routes in West Salem, not just Routes 22 and 23.

Looking at just the ridership from bus stops that were replaced by the West Salem Connector and not by new fixed routes, there were an average of 24 boardings a day (see Figure 1). However, this is excluding the Glen Creek Transit Center. Even assuming 100% of those 24 boardings also had associated boardings at the transit center, boardings would have been an average of 48 a day.



### Could Be Better

Average boardings per day have waxed and waned throughout the pilot due to factors including overlap with Routes 22 and 23 for the first three months, the launch of the Moving Forward system redesign in September 2015, the introduction of a fare on the Connector in December 2015, and seasonal variations.

Ignoring the first three months of service when the Connector ran alongside Routes 22 and 23, the Connector has averaged 49.7 boardings per day. This is just above our minimum target.

That being said, the service zone has greatly expanded and the Route 6 tripper from West Salem High School is not carrying nearly as many riders as Routes 22 and 23 once did.

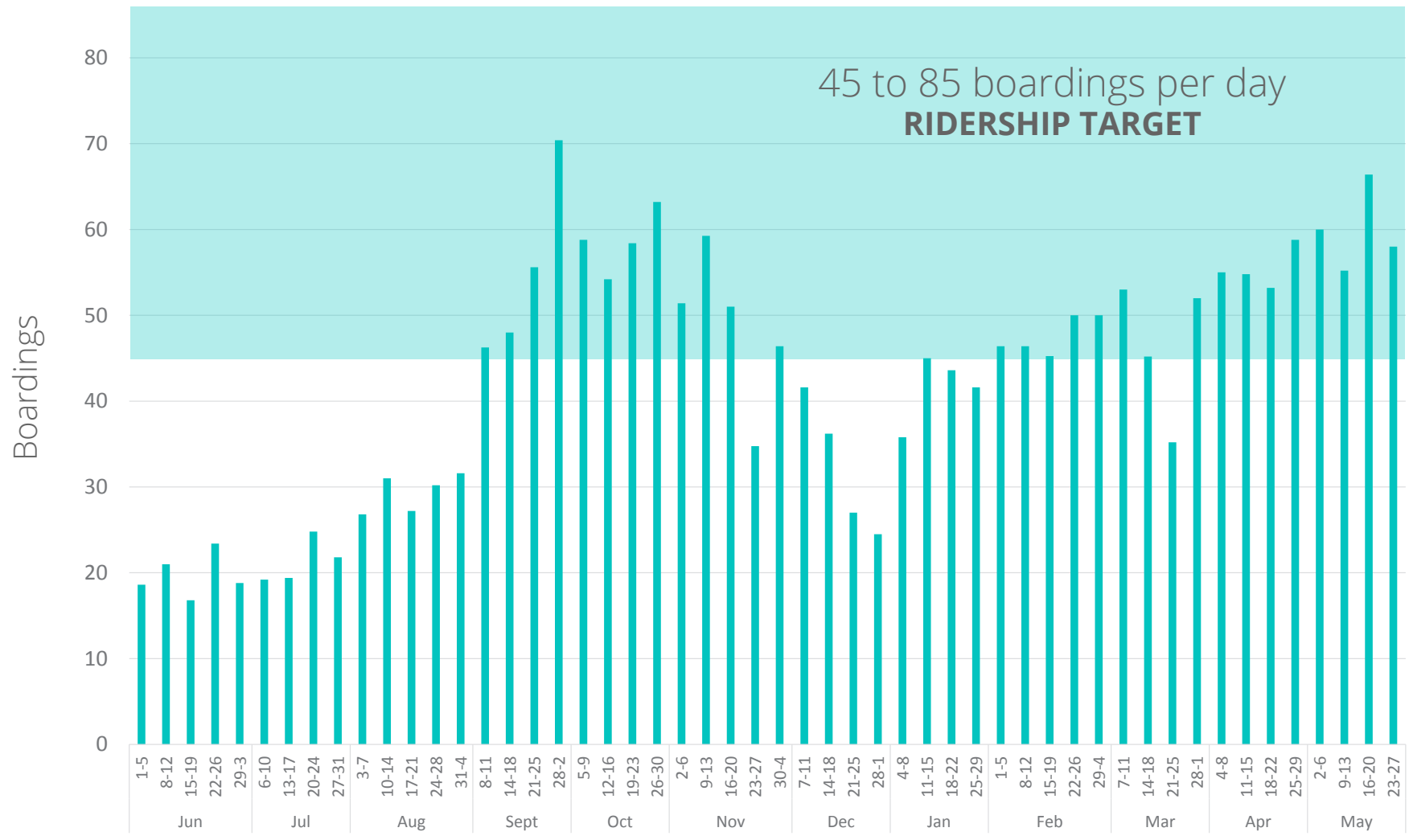


### Promote service to expanded service areas

Focus future efforts to promote the Connector on areas of West Salem that were not served by Routes 22 and 23. It is likely these people are less likely to have ridden the bus before, and might need more information about the service we have to offer.



## Average Boardings by Week



# Create a more efficient and cost-effective service

## Reach target of 3 to 5 boardings per revenue hour

Boardings per revenue hour—the time a bus is scheduled to pick up and drop off passengers—is a common way of measuring the efficiency of a bus route. Based on the ridership seen by other on demand transit systems across the country, the Paradigm Planning student group recommended Cherriots attempt to get three to five boardings per revenue hour.

Denver RTD is a good peer agency to compare the Connector to since they use the same software. Denver currently operates 23 Call-N-Ride zones similar to the West Salem Connector. On average, they see 3.9 boardings per revenue hour. Their least-productive zone has 1.3 boardings per revenue hour, and their most productive zone has 7.5 boardings per revenue hour.



### Could Be Better

Ignoring the first three months of service when the Connector ran alongside Routes 22 and 23, the Connector has averaged 3.3 boardings per revenue hour. This is just above the minimum target. Although ridership is within the target range, staff believe more can be done to increase ridership without increasing resources.



### Attempt to boost ridership during slow periods

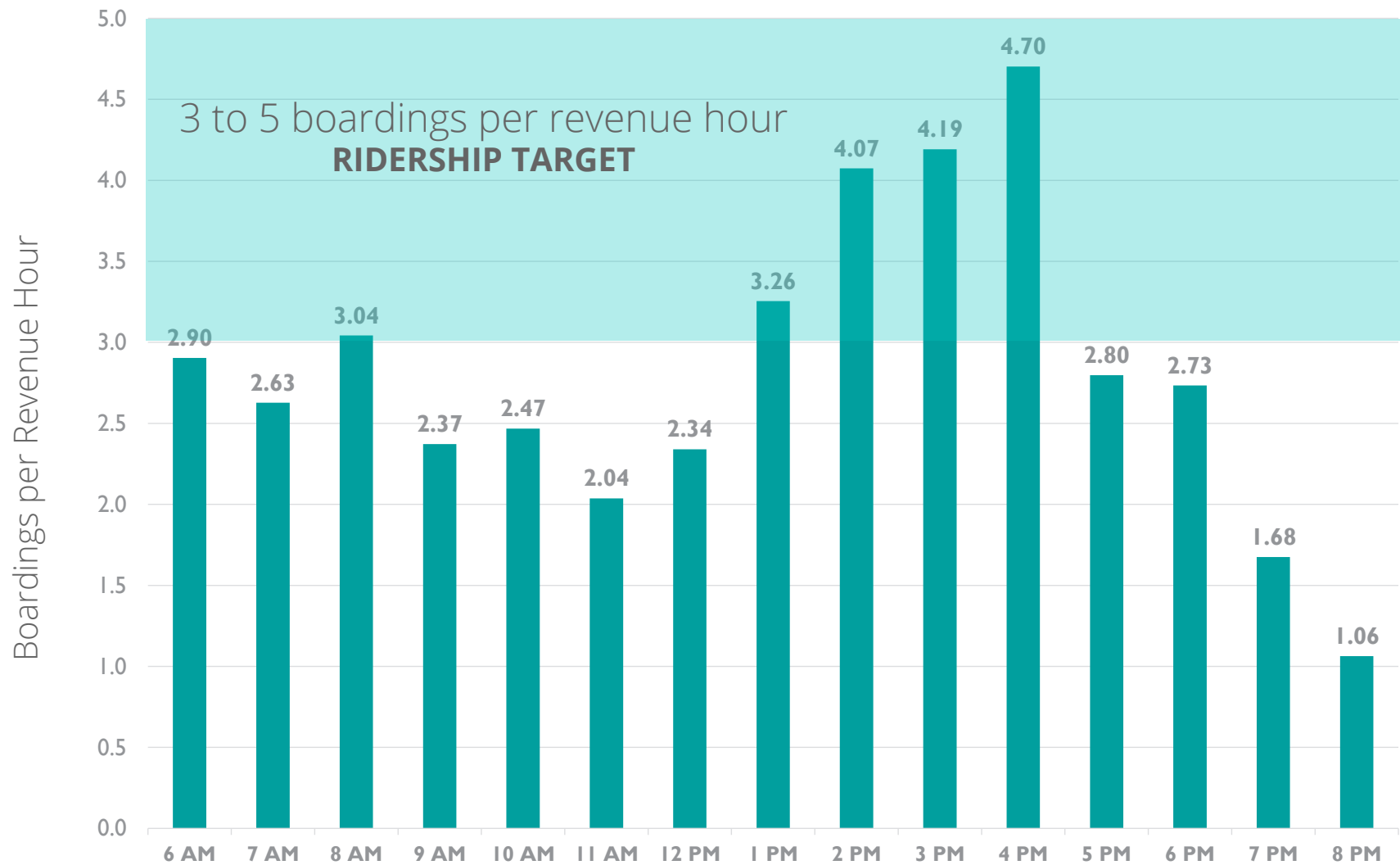
At certain times of the day, the Connector is carrying an average of close to five riders in an hour. However, there are also times of the day where the Connector only carries an average of one rider in an hour. One way to take advantage of the capacity of the Connector is to promote ridership during the least-productive times of the day. Methods could include targeting students and seniors going shopping, both of whom are more likely to use the Connector at off-peak times.



### Explore reducing the advance booking time

Work with the software provider to get the advance booking time as close to real time as possible in order to reduce this barrier to entry.

## Average Boardings per Revenue Hour by Hour of Day



# Create a more efficient and cost-effective service

Place pickup and drop-off points in places where they will be utilized

In order to evaluate how useful each pickup and drop-off point is, staff totaled the number of times a rider took a trip to and from each point. Below is a table showing each point's activity—or the average number of pickups and drop-offs by day.

## Relative Activity by Each Point



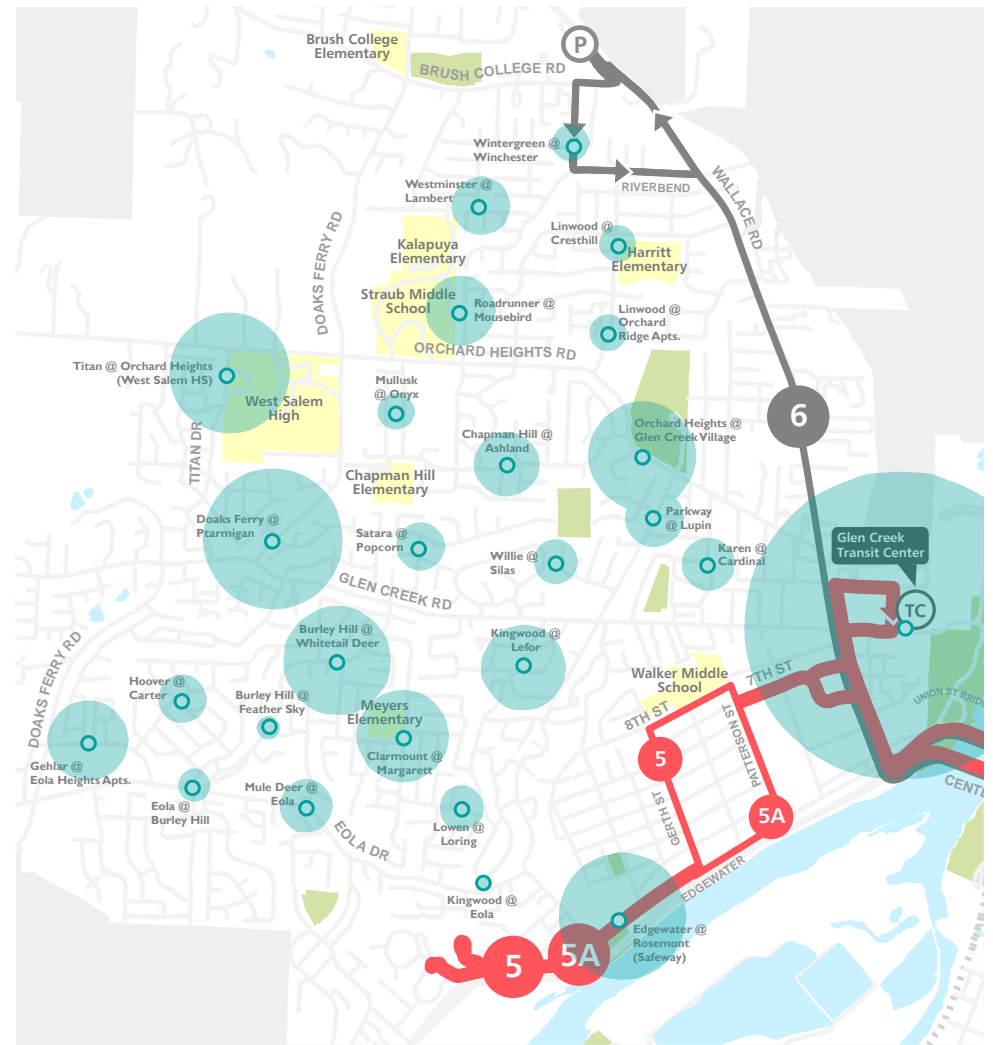
### Almost There

Overall point activity is relatively spread throughout the system. However, there are a few points that see very few pickups and drop-offs.



### Evaluate point usefulness when investing

Over time as Cherriots provides better amenities for these pickup and drop-off points, all locations should be evaluated to ensure improving them are worth Cherriots' investment.



## Daily Average Activity by Pickup and Drop-Off Point

Pickup and Drop-off Points	Point Activity	Pickup and Drop-off Points	Point Activity
Glen Creek Transit Center	<b>38.0</b>	Karen @ Cardinal	<b>1.2</b>
Doaks Ferry @ Ptarmigan	<b>7.8</b>	Satara @ Popcorn	<b>1.0</b>
Edgewater @ Rosemont (Safeway)	<b>6.6</b>	Hoover @ Carter	<b>1.0</b>
Titan @ Orchard Heights (West Salem HS)	<b>5.8</b>	Willie @ Silas	<b>0.9</b>
Orchard Heights @ Glen Creek Village	<b>4.7</b>	Lowen @ Loring	<b>0.8</b>
Burley Hill @ Whitetail Deer	<b>4.7</b>	Linwood @ Cresthill	<b>0.6</b>
Clarmount @ Margaret	<b>3.4</b>	Linwood @ Orchard Ridge Apts.	<b>0.6</b>
Kingwood @ Lefor	<b>3.0</b>	Mullusk @ Onyx	<b>0.6</b>
Gehlar @ Eola Heights Apts.	<b>2.6</b>	Wintergreen @ Winchester	<b>0.6</b>
Roadrunner @ Mousebird	<b>2.0</b>	Eola @ Burley Hill	<b>0.4</b>
Chapman Hill @ Ashland	<b>1.8</b>	Burley Hill @ Feather Sky	<b>0.2</b>
Westminster @ Lambert	<b>1.5</b>	Kingwood @ Eola	<b>0.1</b>
Parkway @ Lupin	<b>1.4</b>		
Mule Deer @ Eola	<b>1.2</b>		



# Create a more efficient and cost-effective service

## Save money by using retired CherryLift vehicles

The District chose to use retired paratransit buses for this pilot rather than purchase new buses.

The Connector service has only one vehicle operating at a time, but uses two physical vehicles: one as the primary, and one as the backup. The vehicles are retired CherryLift cutaways—a 2002 and 2003 Ford E-350. Both are well past their useful life, with 296,000 miles and 254,000 miles, respectively.

During the first year of the pilot project, the labor and parts it cost to maintain the two Connector vehicles was \$34,787—which amounts to \$1.08 per mile. This was much higher than what staff budgeted for vehicle maintenance. Compared to the two oldest vehicles in our paratransit fleet, both of which are 2007 Ford E-450s with 170,000 miles and 163,000 miles, respectively, maintaining the Connector vehicles cost just over five times as much.



A retired CherryLift vehicle parked in the Cherriots vehicle lot.



### Failing

Between the cost of maintaining the Connector vehicles (five times the normal rate) and the rate at which a vehicle breaks down and disrupts service, the Connector vehicles have failed to provide cost-effective service.



### Purchase new vehicles as soon as possible

The District should purchase new vehicles to decrease the cost of maintenance. Buy vehicles that can be used for other services if the Connector service is eventually discontinued.

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# Create a more cost-effective service than Routes 22 and 23

Another way of measuring efficiency is by determining the cost per boarding. That is, how much Cherrriots spends in total on the Connector divided by the total number of boardings.

The year-end estimate for the first year of the pilot project was approximately \$254,800. With 10,805 total boardings, the cost per boarding was \$23.58. Looking at the service specifically from the discontinuation of Routes 22 and 23 (September 8, 2015) until the end of May 2016, the cost per boarding was \$20.88.

On the sections of former Routes 22 and 23 replaced by the Connector—assuming a cost of \$70.41 per revenue hour, 8.3 revenue hours, \$2.39 per revenue mile, 84.7 miles per day, and 48 boardings per day—the cost per boarding was \$16.39.



## Needs Improvement

At the moment, the Connector is costing Cherrriots more per boarding than Routes 22 and 23 did. This is largely a result of the increase in revenue hours and the unexpected vehicle maintenance costs. Additionally, it is influenced by the fact that Cherrriots is paying MV Transportation for deadhead and operator relief time.



## Reduce costs of vehicle maintenance and labor

By procuring new vehicles or using more recently retired vehicles, the cost of vehicle maintenance should be able to be reduced. Work with MV Transportation to make the scheduling of driver shifts more efficient in order to reduce labor costs.



# Improve service throughout pilot

Over the year-long pilot project, staff made dozens of improvements to the service, software, etc. Staff monitored, evaluated, and made modifications when necessary throughout the pilot.

## Online Booking



### Streamlined online registration process

At the beginning of the pilot project, registering online was a cumbersome process involving choosing a username and manually having to enter an auto-generated password in order for the rider to set a new password. Staff worked with DemandTrans to streamline the registration process so users can log in using their email addresses. Passwords are set using a simple web link.

June 2015

To complete the registration, please enter all the required information below.

First Name

Last Name

Email

Phone #

Type of phone number: Mobile

Preferred Notification Method: Email

Primary Service Area: West Salem Service Zone

Register

Already have an account? [Login](#)



### Improved online booking interface

Redesign the online booking interface to be more intuitive and user-friendly. Improvements included changing colors and language.

June 2015

Book a New Trip

Book trips from Thu May 19, 2016 3:50 PM and no later than Thu Jun 2, 2016

Select Service Area: West Salem Service Zone

Origin: Satara @ Popcorn

Destination: Glen Creek TC (Connect with Rte. 5/5A)

Trip Details

Date: 5/19/2016

Time: 03:50 PM

Select: Depart At, Arrive By





### Added ability to view past trips

Riders can view their trip history, and can use that history to easily rebook trips between the same pickup and drop-off points.

*September 2015*



### Improved Find My Ride

When viewing an upcoming trip, riders can now get a countdown until the bus will arrive. The vehicle shown on the map is animated to show its progress.

*September 2015*



### Added booking receipts

Riders now receive conformation emails with their trip details when they book a trip.

*May 2016*



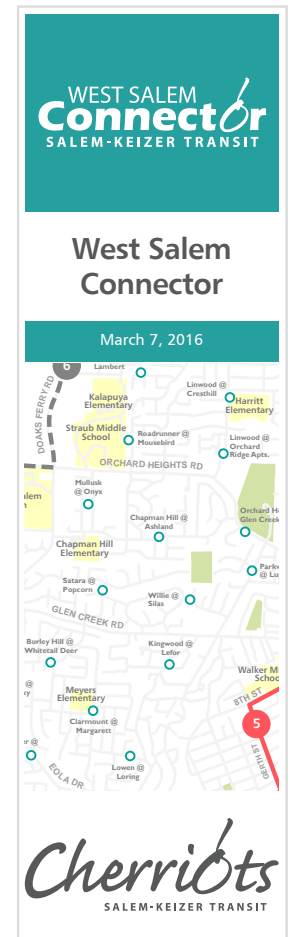
### Produced foldable schedule

Developed a foldable schedule that fits in the schedule holders used throughout the Cherriots system.

The schedule has a map of the pickup and drop-off points, information on connecting routes, and details on how the service works and how to book a trip.

*November 2015*

## Print Materials



# Improve service throughout pilot

## Service



### Changed advance reservation to 30 minutes

When launched, riders could only book trips up to an hour in advance. After a few months of service and discussions with DemandTrans, staff was confident enough in the software that the advanced reservation requirement could be changed to 30 minutes.

August 2015



### Added ability to book recurring trips

Riders wishing to book multiple trips recurring at least once a week now have the ability to do so. They can book trips for up to three months at a time.

August 2015



### Expanded service zone with two new points

To help deal with expected demand from West Salem High School students, staff added two new pickup and drop-off points, Titan @ Orchard Heights (West Salem HS) and Wintergreen @ Winchester.

August 2015



## Back-end and Driver Interface



### Added mass cancellation and notifications

Worked with software provider to create a mass cancellation and notification system. This was developed to be used during snow or ice events when the Connector is unable to serve some or all stops.

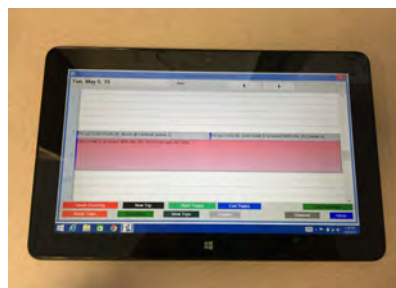
*December 2015*



### Rebuilt driver interface from scratch

Replaced the calendar-based interface with a task-based interface with turn-by-turn navigation. This makes the job of the driver simpler, allowing them to give more attention to driving and customer service. The new interface also makes pickup ETA notices much more accurate and reliable, and opens up the possibility of reducing the advance reservation requirement to less than 30 minutes in the future.

*April 2016*



### Installed new shelters at Glen Creek Transit Center

As part of the Bus Stop Improvement Project, all the shelters at Glen Creek Transit Center were replaced. These shelters look more modern, and have much larger schedule than the old shelters.

Staff designed a custom shelter schedule for the West Salem Connector which shows the system map, layover times and how-to instructions.

*April 2016*



# Improve service throughout pilot project

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## Log and respond to rider complaints

When a rider has an issue with booking a trip or a bus not arriving on time, customer service representatives are on the front line to help the rider out. When a rider has a poor experience on the bus, the driver is the first to know.

No matter who is told about the issue, the goal is for that issue to be resolved by the first point of contact in real time. However, if there is a pattern of issues or an issue with the software, the issue needs to be logged and dealt with by other staff members or MV Transportation.



### Could Be Better

Staff do not have an effective way of tracking issues related to the Connector. A lot of issues that come into Customer Service are filtered through the project manager to the software provider. Also, official customer contacts are logged and responded to using the official customer contact database. However, issues and ideas are not logged in a place that is accessible by all staff to be analyzed and summarized.



### Develop new customer issue logging process

Create a central database or ticketing system for logging all customer complaints, issues and ideas related to the Connector. Create a system for responding to issues and ideas in a reasonable time frame.



### Meet monthly to discuss issues

Conduct a monthly meeting dedicated to discussing ongoing issues with the Connector. Ensure all tickets are getting properly responded to and closed out.

# Gather rider feedback and ideas throughout pilot

A lot of public input went into determining how the Connector was designed and implemented. During the *Capturing the Ride* project, the project team surveyed riders on the buses and online, held community workshops and open houses, and organized focus groups.

Additionally, staff put a lot of time and energy into promoting the service. Leading up to the launch of the Connector, staff organized outreach events at multiple locations in West Salem to spread the word about the new service.

During the pilot, however, staff only conducted two rider surveys. Both surveys were emailed to all Connector riders. For those without email addresses in the system, staff made calls to administer the survey. One survey was conducted in August 2015, and the other was conducted in February-March 2016.



Lauren Wirtis and CJ Doxsee hosting a community workshop during the *Capturing the Ride* project.



## Could Be Better

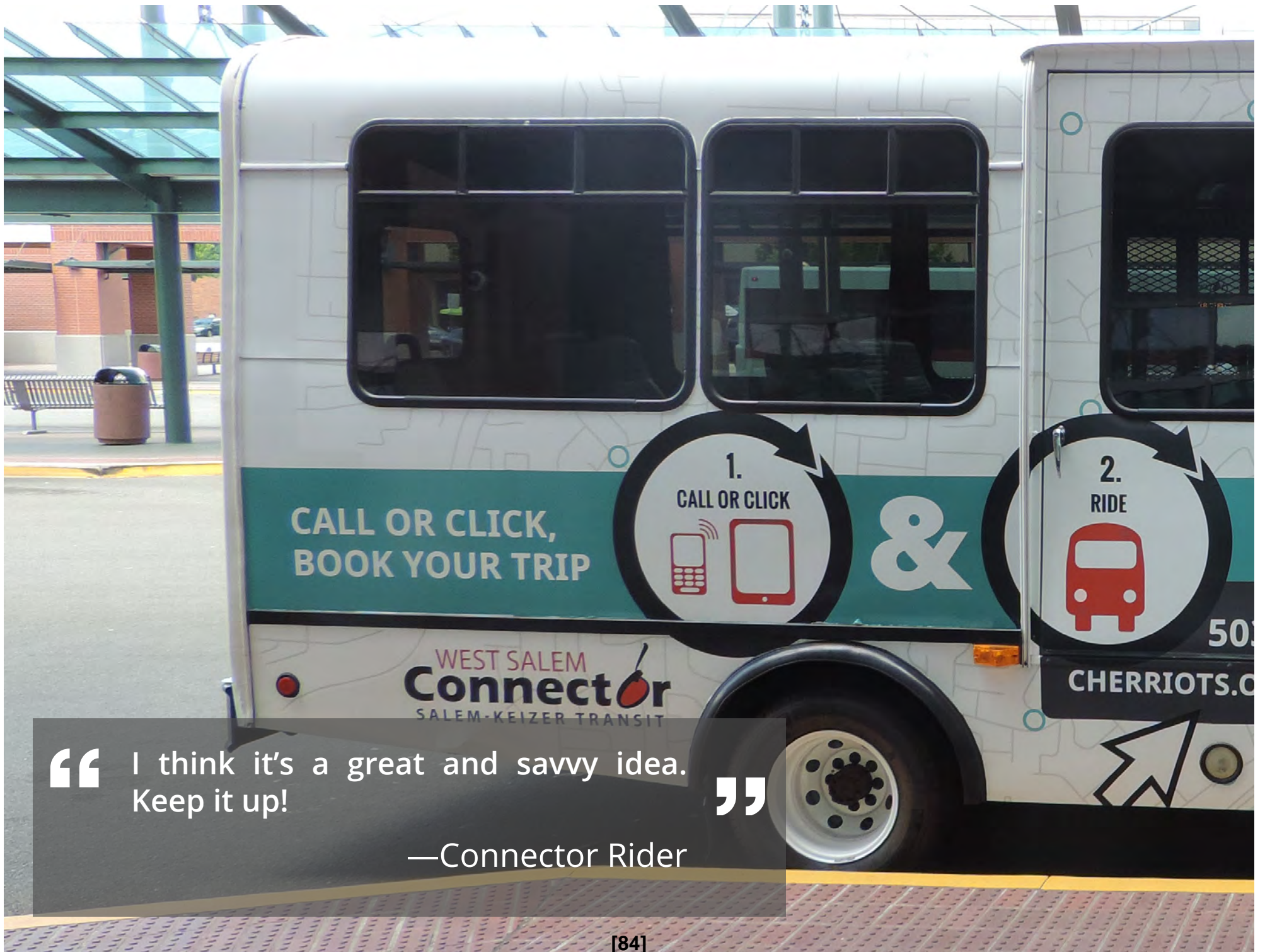
Although staff conducted a couple online and telephone surveys throughout the pilot project, staff did not gather enough in-person feedback from riders and drivers. More direct contact with riders and drivers would help staff learn about the needs of the riders. Additionally, the schedule for surveying was not predetermined. More could have been done to survey riders on a regular basis.



## Develop a public feedback strategy plan

Gathering feedback and ideas from riders and the greater community is a critical tool to learn about how Cherriots can make the Connector work better for everyone. Staff should develop a comprehensive public feedback strategy plan for the Connector. The plan should include what staff is trying to learn, who they will reach out to, what methods they will use to do so, and a timeline for gathering the feedback. Some options include on-board surveys, casual ride-alongs, and community events.





“

I think it's a great and savvy idea.  
Keep it up!

”

—Connector Rider

# Next Steps



# Discussion and Next Steps

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In the Flexible Transit Plan, Paradigm Planning made it clear that “the purpose of flexible transit is not high ridership but coverage and service to transit-dependent populations that would not otherwise have access to transit.”

They went on to recommend that Cherriots explicitly define the goals and objectives of the project, and determine whether those goals and objectives are being met in the evaluation. They concluded that “overall, the evaluation of success will be specific to the service and the population and will be best informed by qualitative rather than quantitative data.”

If staff were to measure the West Salem Connector purely based on productivity, staff would not deem this service deemed successful. Looking at other metrics, though, there are many ways in which the Connector has been a success. However, there is still more work to be done to improve the service and make it more useful, more popular, and more efficient.

Because of this, staff recommend the Board of Directors extend the pilot project into a second year. During the next year, staff will accomplish the following:



## Improve Service in West Salem

Develop and implement a work plan to put into action all the recommendations in this report. Help make the West Salem Connector more productive and useful without increasing resources.



## Plan for New Connector Zones

Explore where new Connector zones could be effective in other communities throughout Salem and Keizer. This planning process will involve extensive public outreach, and will be part of a comprehensive look at the effectiveness of the Moving Forward service change.

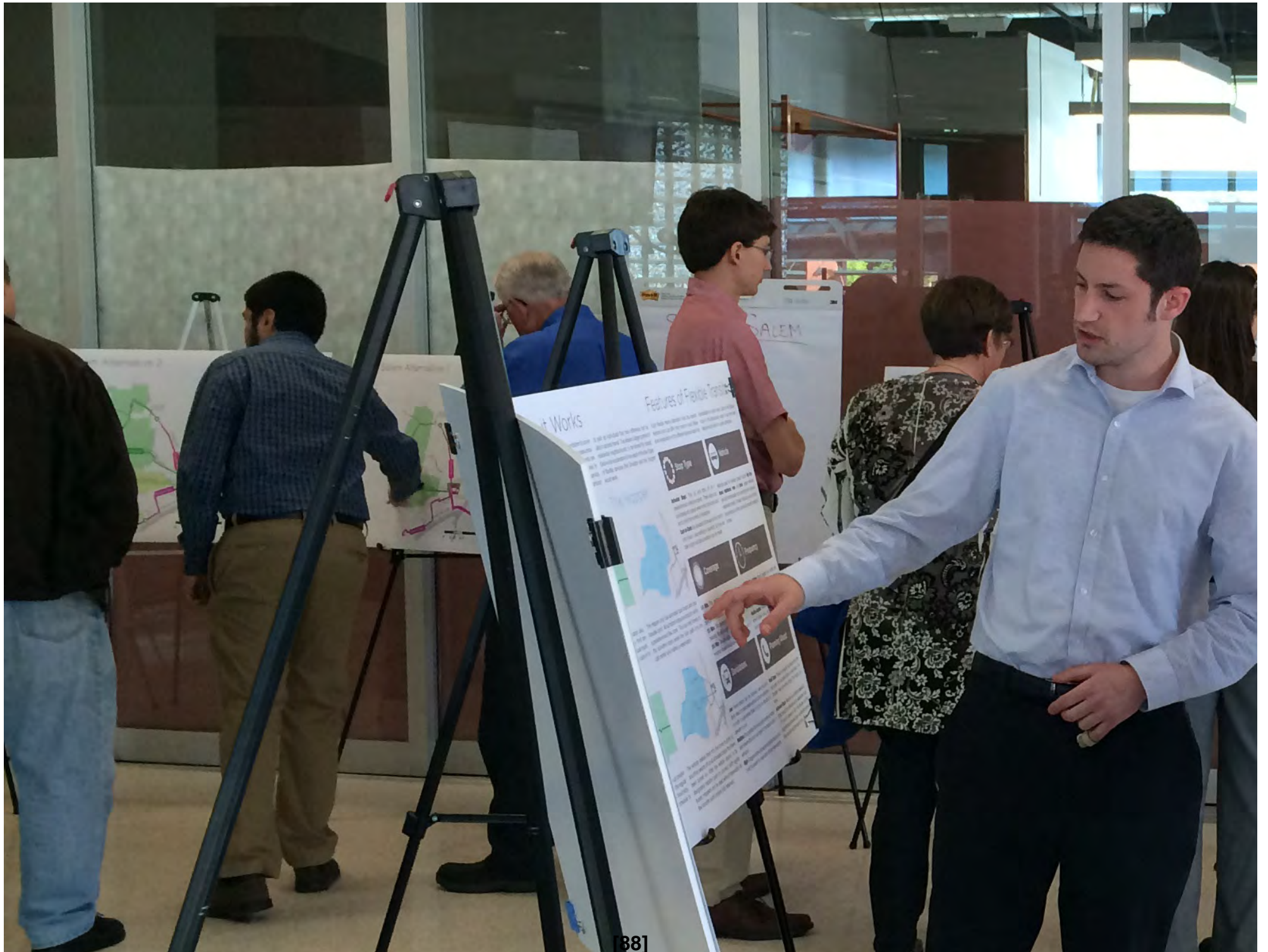


## Explore Technology Options

The current software contract is set to expire in March 2017. This is a good opportunity to explore all the on-demand transit software that have come online in the last year and a half. Staff should ensure the Connector software offers our riders the best possible experience.







# Glossary



# Glossary

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**American Disabilities Act (ADA):** The Americans with Disabilities Act of 1990 is a civil rights law that prohibits discrimination based on disability. In regard to transit, it mandates that transit agencies provide complementary paratransit service where fixed-route transit is offered.

**Cherriots:** Cherriots is the name used by Salem Area Mass Transit District.

**CherryLift:** CherryLift is the name of the paratransit service provided by Cherriots.

**Demand-Responsive Transit:** Transit that operates in response to calls or requests from riders. Drivers receive the request, who then dispatch a vehicle to pick up riders and take them to their destinations. These vehicles do not operate on a fixed route or fixed schedule and typically pick up several passengers at different locations before taking them to their respective destinations.

**DemandTrans:** The provider for the Connector smart booking and smart dispatching software.

**ETA:** Estimated time of arrival. Riders receive a pickup ETA via email, text, or automated call, which gives them an estimate of when their bus will arrive.

**Fixed-Route Transit:** A common form of transit where vehicles have a predetermined route and schedule.

**Frequency:** The number of times a bus will arrive at a bus stop in a given interval. For example, a bus running every 15 minutes would have a frequency of four buses an hour.

**Headway:** The time interval between buses at a given location. For example a 60-minute headway indicates that a bus will arrive at a stop on that line every 60 minutes.

**Local Through Streets:** Local streets with connections to arterials and collectors.

**Cutaway:** A cutaway uses a bus-body attached to a small- or medium-sized truck chassis, behind, and attached to the truck's cabin. The back of the cabin is cut away to allow access to and from the bus body.

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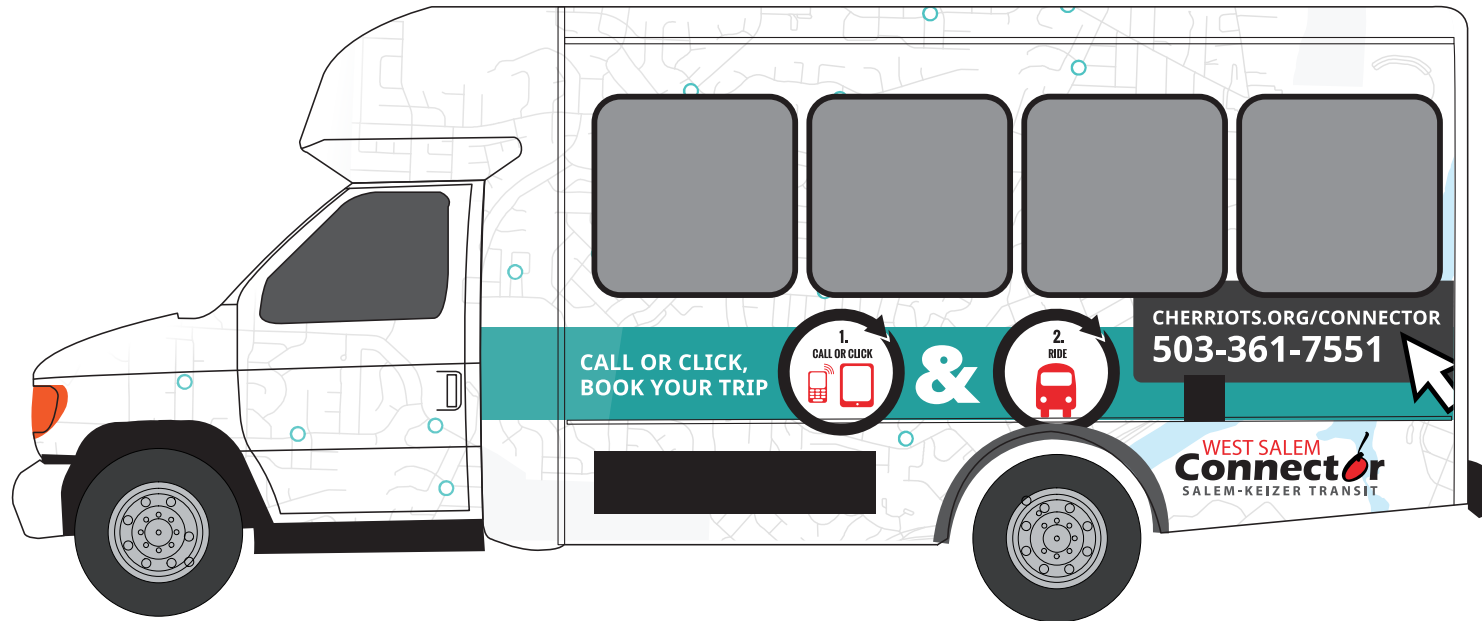
**Mobility DR:** The name of the software used by the Connector for smart booking and smart dispatching.

**On-Demand Transit:** Transit service which responds quickly to rider demands. This type of service often requires riders to book their trip, either in realtime or in advance.

**Paratransit:** This is a type of transit service specifically designed for people with disabilities. It is often provided in the form of demand-responsive transit.

**Pickup and Drop-Off Point:** Intersections where riders can book trips to and from. For most pickup and drop-off points, a bus will only arrive if the rider books a trip in advance. The one exception is at Glen Creek Transit Center, where the bus is scheduled to be there once an hour. Riders are allowed to walk on at this pickup point without a reservation.





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

**Issue**

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

**Background and Findings**

Board members are appointed to local, regional, or national committees. Board members also present testimony at public hearings on specific issues as the need arises. After these meetings, public hearings, or other activities attended by individual members on behalf of SAMTD, time will be scheduled for an oral report/update. The following activities have designated board member representation:

**Board/Committee**

**Director(s)**

Special Transportation Fund Advisory Committee (STFAC)

Director Hammill

Alternate: Director Thompson

Mid-Willamette Area Commission on Transportation (MWACT)

Director Kelley

Alternate: Director Lincoln

Mid-Willamette Valley Council of Governments (MWVCOG)

Director Thompson

Alternate: President Krebs

Salem-Keizer Area Transportation Study Policy Committee (SKATS)

President Krebs

Alternate: Director Busch

Oregon Metropolitan Planning Organization Consortium (OMPOC)

President Krebs

Alternate: Director Busch

Salem River Crossing Oversight Committee

President Krebs

Alternate: Director Lincoln

**Recommendation**

Receive and File

**Proposed Motion**

None

Salem Area Mass Transit District  
Board of Directors

~ **WORK SESSION** ~

May 9, 2016  
Courthouse Square – Senator Hearing Room  
555 Court Street NE, Salem, Oregon 97301

**MINUTES**

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

Staff Allan Pollock, General Manager; David Trimble, Chief Operating Officer; Paula Dixon, Director of Administration; Patricia Feeny, Director of Communication; Matt Berggren, Planning Technician; Kristian Sorensen, Technology Support Services Analyst; and Linda Galeazzi, Executive Assistant

Guests Mike Jaffe, Transportation Program Director, Mid-Willamette Valley Council of Governments (MWVCOG)

**1. CALL TO ORDER** **5:30 PM**  
President Bob Krebs called the work session to order at 5:30 p.m.

**2. DISCUSSION**

**a. Congestion Mitigation Air Quality (CMAQ) Briefing** **5:30 PM**

Staff report: Pages 1-8 of the agenda

Presented by: Mike Jaffe, Transportation Program Director, MWVCOG

Mr. Jaffe reviewed the purpose of the federal Congestion Management and Air Quality Improvement Program for areas that do not meet air quality standards in non-attainment areas and maintenance areas; and the types of projects that qualify for CMAQ funding to support transportation projects and programs that help to improve air quality and reduce traffic congestion. The Federal Highway Administration (FHWA) ranks the projects with a cost benefit component for more effective projects. There is more information about the guidelines on the website: [http://www.fhwa.dot.gov/environment/air\\_quality/cmaq/](http://www.fhwa.dot.gov/environment/air_quality/cmaq/).

It was recently determined by the Oregon Department of Transportation (ODOT) and the FHWA that Salem-Keizer and Eugene-Springfield areas are eligible to receive a portion of Oregon's CMAQ funds which currently total \$17 million. The Salem-Keizer Area Transportation Study (SKATS\*), a designated Metropolitan Planning Organization (MPO) and the Central Lane MPO are working with ODOT to determine how and when this funding will be reallocated to include Salem-Keizer and Eugene-Springfield areas. SKATS and Central Lane have recommended that funding be based on the historical inclusion when funding was distributed by the level of non-attainment and population. It is currently based on funding levels received in 2009.

ODOT is reviewing all options to allocate the formulas and will send a letter to all of the agencies affected in June 2016. The State is forming a task force and will have consultations with all of the MPOs to determine the next steps. Meetings will be set up in June and July. A



decision is anticipated in the Fall 2016.

Comments: Mr. Jaffe explained that the State may be setting up a proposal. Salem has been eligible for years, but has received no funding; in contrast, Portland has been granted funds for years.

President Krebs noted some news shared at an OMPOC meeting, that funds had already been allocated in the Transportation Improvement Plan (TIP\*) for projects submitted by Medford, Grants Pass, Klamath Falls and Portland. There are many projects in the TIP that could use the funds but the District could possibly not see funding until 2019. He recommended that a transit official be included on the task force for input.

Mr. Jaffe suggested that letters from supporting agencies, like the Oregon Transit Association, be written at some point in the future to emphasize the need for the ITS projects and traffic flow improvements.

Board members discussed that the Board can play a role in helping to not lose these funds.

Director Kelley suggested that she may be able to discuss the issues with the Mid-Willamette Area Commission on Transportation (MWACT). It has an effect on Keizer, Turner, and CARTS, etc.

Mr. Jaffe said he will keep the SKATS Policy Committee informed. There are a lot more discussions that will take place.

**Direction: Board members recommended to Mr. Jaffe that President Krebs be considered to serve on the task force. President Krebs is the District's representative at all of the Oregon Metropolitan Planning Organization Consortium (OMPOC\*) meetings. President Krebs said the Board needs to know the timeline and how the funds will be divided. Director Hammill said the Board needs to decide on some projects.**

- OMPOC: <http://www.ompoc.org/> Oregon currently has eight MPOs covering metropolitan areas of Portland, Salem- Keizer, Corvallis, Eugene-Springfield, Medford-Ashland, Bend, Albany Area, and Middle Rogue. Each MPO has two representatives on the OMPOC.
- MPO: a federally mandated body for any urban area over 50,000 in population.
- SKATS: the designated Metropolitan Planning Organization (MPO) for the Salem-Keizer area. <http://www.mwvcog.org/programs/transportation-planning/skats/>
- SKATS Policy Committee: adopts the long-range regional transportation plan and decides how the federal transportation funds available to the urban area will be spent on transportation projects and programs
- TIP: 4-year allocation of federal and state transportation funds to projects; Updated every 2-3 years <http://www.mwvcog.org/programs/transportation-planning/skats/planning-programs/transportation-improvement-program-tip/>

## **b. State Employee Bus Pass Program and Route 15X Implementation**

**6:00 PM**

Staff report: Pages 9-12 of the agenda

Presented by: Steve Dickey, Director of Transportation  
Matt Berggren, Planning Technician

Mr. Berggren presented an overview of the new express Route 15X from Airport Road Park & Ride to the Oregon State Capitol Mall that begins operation on June 6, 2016. Route 15X will operate from 6:15 a.m. to 8:53 p.m. It will run every 15 minutes in the peak commute hours (6:15 a.m. to 9:00 a.m. and 3:00 to 6:00 p.m.) and every 30 minutes in the off-peak hours. With the addition of this express route, Route 4 will discontinue its hourly run to the Airport Park & Ride. There will be a new bid on June 6<sup>th</sup> and with that, there will be a few minor service changes.

Mr. Dickey reported on the State Employee Bus Pass Program that officially begins July 1, 2016.

State employees who choose to ride the bus and work in the Capitol Mall area will fill out a form provided by the Department of Administrative Service (DAS) and will receive a sticker to put on their State employee identification badge. The sticker serves as a bus pass and is good on all of the fixed-routes for any purpose. The pass will include the SMART Route 1X to Wilsonville but will not include Route 2X to Grand Ronde. That is because Route 2X is a commuter service provided by contract through the Confederated Tribes of Grand Ronde. The District has not yet had a conversation with them about the State's bus pass program.

The District will begin a soft opening of the bus pass program on June 6<sup>th</sup> to coincide with the initiation of the Route 15X service. The State is working on their internal process to get ready and has asked for electronic informational materials to give to each of the state agencies to promote as they see fit. The Airport Park & Ride lot has also been cleaned up and re-stripped.

Comments: Director Thompson asked about the changes to Routes 4 and 4a. Mr. Berggren explained that time was added to the schedule for those routes which will make those trips much better.

Director Evans asked how full they anticipate the express route bus will be. Mr. Dickey responded in previous years, the route was full during the peak hours, and during the legislative session there was standing room only. Director Hammill commented that it was used a lot. Not having to find a parking spot or pay for parking was a big incentive.

Director Busch asked if the bus pass program was addressed in the proposed budget. Mr. Pollock responded that it is as a pass-through program.

In response to President Krebs question, Mr. Dickey explained that a map and schedule for Route 15X will be up on bus shelters along that route. The Market Street Park & Ride is another place the Capitol Mall employees can park to use the bus to work. DAS also has an incentive for their employees if they are willing to try the service and are also waiting for a parking space; that employee will not lose their spot on the waiting list.

Director Hammill asked if the stickers were dated. Mr. Dickey responded that the stickers on the I.D. badges will be good for one calendar year.

Director Kelley spoke about writing a letter to DAS to tell them about the convenience of signing up for the program. Mr. Pollock advised that that the process for signing up would begin again with each new year in January. The contract is good for five years.

**Direction: Director Evans recommended that the service be advertised in the Keizertimes and West Salem newspaper. Director Kelley said that she could spread the word to the Capitol Club and legislative administration.**

**Director Kelley recommended that staff research an intermediate stop after the Airport Park & Ride stop at the ODOT Region 2/Lottery Office site. She recalls that there may have been a stop at that site when Route 15X was the old Route 20.**

### **c. Review Process for General Manager's Performance Evaluation**

**6:30 PM**

Staff report: Verbal

Presented by: Paula Dixon, Director of Administration

Ms. Dixon explained the process for doing a performance evaluation of the general manager. The Board will choose a member of the Board to review the compilation of performance evaluations prior to the executive session for accuracy. The Board will meet in a Special Meeting/Executive Session to review the compilation on July 11 after their work session and if there is any action to be taken, will do so in the Special meeting.

Direction: **The tentative schedule for the general manager's performance evaluation was discussed as follows: Mr. Pollock will complete his self-evaluation for Board review in one week. Board members will complete the general manager's performance evaluation by the June 13 work session. A board member will be chosen to review the compilation of the evaluations at the May 26 Board meeting. The Board will meet in executive session on July 11 after the work session for discussion of the compilation and compensation.**

### 3. GENERAL MANAGER COMMENTS

6:11 PM

Staff report: Pages 13-16 of the agenda

Presented by: Allan Pollock, General Manager

Board members reviewed their May calendar. The Budget Committee Orientation is May 5<sup>th</sup>, and the Budget Committee will meet to hear the Budget Message and review the Proposed Budget for Fiscal Year 2017 on May 12<sup>th</sup> and May 19<sup>th</sup>. The first two outreach events to receive public input for the Coordinated Plan is at the Santiam Senior Center in Stayton at 1:30 p.m. and at the Country Meadows Village in Woodburn at 5:30 p.m. on May 17<sup>th</sup>.

Mr. Pollock noted that an update on the bus stop improvement project was pulled from the May 26<sup>th</sup> Board meeting agenda. He responded to questions for more information asked by Board members through emails -

- Director Hammill asked about the number of bus stops that had been placed in the bus stop improvement program. Mr. Pollock reported that 85 of the 115 bus stops are now placed. Concerning Director Hammill's inquiry about the schedule for Route 11 and its lack of timeliness, Mr. Pollock said that he will need more time for research.
- Director Kelley asked about the preparation of an RFP for a bus advertising contract. Mr. Pollock advised that the current Bus Advertising Policy will need to be updated and approved by the Board before they start the RFP process. He did not budget any revenue in the proposed FY2017 Budget for the after school you activity transportation program.

President Krebs reported that Director Lincoln had asked at the January Board Retreat that a subcommittee be formed to look at the issues regarding the Salem River Crossing. President Krebs appointed Director Lincoln, Director Evans and himself to serve on this committee. Mr. Dickey advised that Julie Warnke and Dan Fricke would be willing to present new information on this project. There is a land use decision to be made before the EIS is determined.

President Krebs reminded the Board to turn in the Service Log/Activity Reports each month. The Board is covered by the State Industrial Accident Insurance and they need an accurate reflection of the Board's time. He also commented that the Board needs to continue to find ways to get funding; to get this funding at the State level.

### 4. WORK SESSION ADJOURNED

6:52 PM

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